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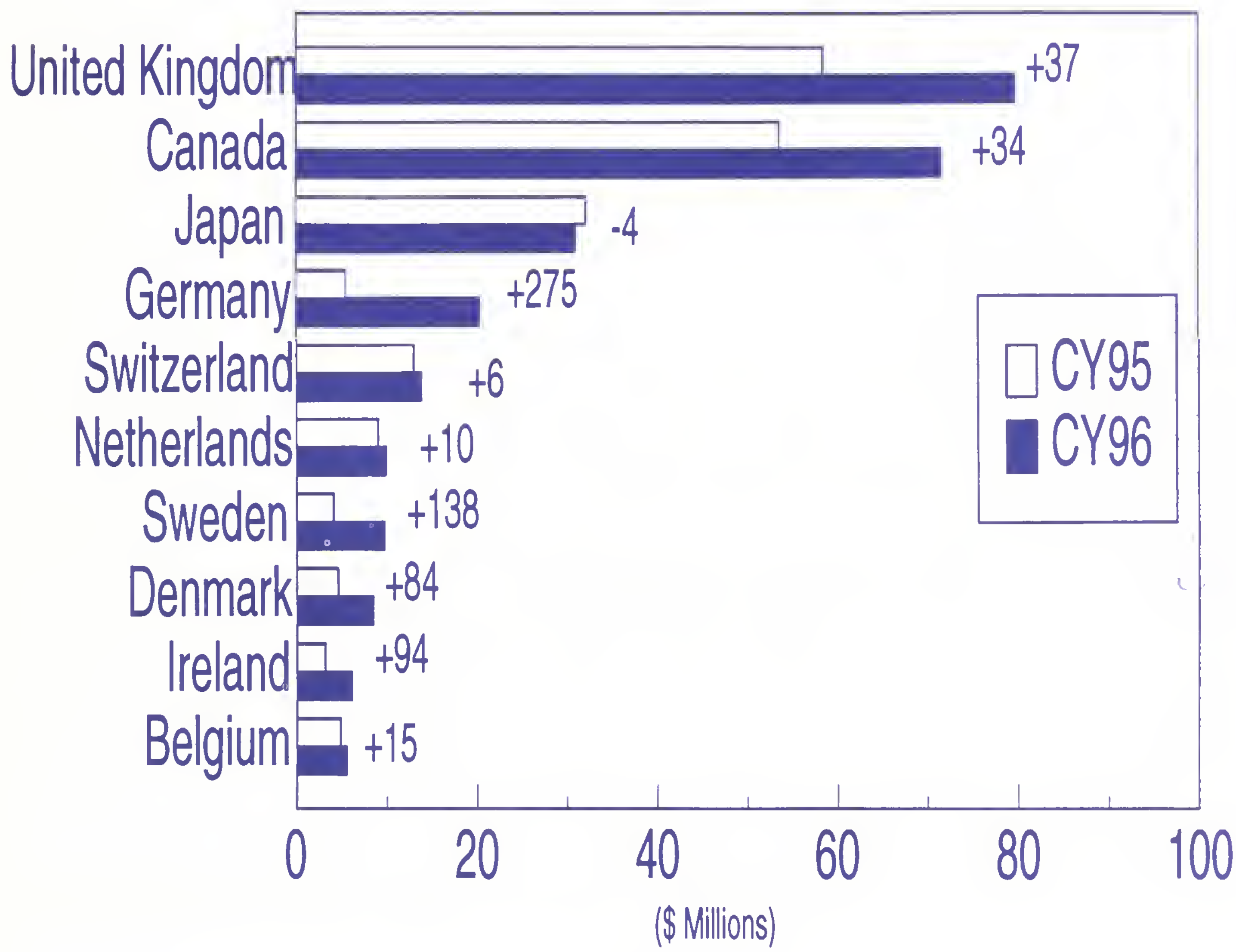
World Horticultural Trade and U.S. Export Opportunities

U.S. Wine Exports Reached Record $320 Million in 1996

Top 10 U.S. Wine Export Markets Showed Broad Growth



Source: U.S. Department of Commerce, Bureau of the Census

U.S. wine exports (including cider, fermented beverages, and must) reached $320 million during calendar year 1996, their 12th consecutive record-breaking year, and a 36 percent gain over the preceding year. Grape wine represented most of the $320 million of the wine exports, except $18 million, consisting of fermented beverages and cider. U.S. wine shipments reached 1.8 million hectoliters, 23 percent above 1995. U.S. wines registered impressive value gains in Germany (up 275 percent); the United Kingdom (up 37 percent); and Canada (up 34 percent) -- all markets targeted under the Market Access Program. The export base for U.S. wine is also expanding. Notable new markets are emerging in Denmark, Ireland, the Netherlands, and Sweden. More varieties of higher quality U.S. wine, robust foreign demand, favorable exchange rates, and Market Access Program efforts combined to boost U.S. wine exports.

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ANALYSIS

Sam Rosa	202-720-6086	Fresh deciduous fruit, apple juice, olives, stone fruit, and CBI
Brian Grunenfelder	202-690-2702	Trade policy, food safety, and plant health group leader
Bill Janis	202-720-0897	Fresh and processed potatoes, tree nuts, and tropical fruits
Bob Knapp	202-720-4620	Canned deciduous fruit and kiwifruit
Emanuel McNeil	202-720-2083	Fresh and processed vegetables, melons, bananas, nursery products, and cut flowers
Debra A. Pumphrey	202-720-8899	Coffee, cocoa, tea, spices, essential oils, ginseng, and trade forecasts
Stephanie Riddick	202-720-9792	Dried fruit, avocados, beer, hops, berries, and circular coordinator
Joe Somers	202-720-2974	Situation and outlook group leader, processed citrus, trade forecast coordinator, FAO citrus liaison, and circular editor
Debbie Seidband	202-720-6877	Sugar, honey, and fresh citrus
Yvette Wedderburn Bomersheim	202-720-9903	Wine and brandy, table grapes, GSM-102 export credits, NAFTA coordinator and supplier credits
Janise Zygmont	202-720-3423	Organics

MARKETING

Ted Goldammer	202-720-8498	Fresh citrus and products, hops, and potatoes
Pamela McKenzie	202-720-8495	Canned deciduous fruit, grape juice, cranberries, kiwifruit, and honey
Stacey Peckins	202-720-5330	Tree nuts, papaya, nursery products
Steve Shnitzler	202-720-8495	Dried fruit, avocados, ginseng, and cut flowers
Gina Castelnovo	202-720-0898	Wine, brandy, berries
Kelly Strzelecki	202-720-0911	Organics, fresh vegetables, tomatoes

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Export Summary

U.S. exports of horticultural products to all countries in January reached $824.9 million, up 17 percent from the same month a year earlier. Ten out of 15 categories of horticultural exports registered increases. Categories with the most significant increases in January were fruit and vegetable juices (up $12.9 million or 29 percent), fresh vegetables (up $10.2 million or 13 percent), frozen vegetables (up 9.9 million or 34 percent), wine (up $9.2 million or 58 percent), and miscellaneous products (up $55.7 million or 33 percent). The category with the most significant decrease was fresh non-citrus fruit (down $4.5 million or 6 percent). During the first 4 months (October-January) of fiscal year (FY) 1997, the total value of U.S. horticultural exports was $3.61 billion -- 9 percent above the same period last year.

All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds, 1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon, 1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER - SEPTEMBER YEAR
JAN 97

NAME	QUANTITY					VALUES (1000 OOLLARS)				
GROUP & COMMOOITY	CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MON LAST YR	CURR MON CURR YR	YR TDT LAST YR	YR TOT CURR YR	LAST YEAR
FRESH CITRUS MT										
GRAPEFRUIT	60,936	65,258	184,886	171,097	497,339	28,933	31,285	92,940	85,602	258,858
LEMONS	12,003	13,588	45,004	47,456	132,269	8,746	12,374	41,750	48,181	114,653
ORANGES, INCL. TM	49,215	61,775	127,472	137,616	513,630	25,633	33,668	70,697	76,271	287,699
OTHER CITRUS	3,641	3,605	15,258	14,197	30,208	3,079	3,122	13,463	11,726	24,774
Subtotal:----	125,795	144,225	372,620	370,366	1,173,446	66,391	80,450	218,849	222,280	685,985
FR. FRUIT, NON-CIT MT										
APPLES	59,070	70,506	254,931	292,063	564,953	41,793	45,770	165,700	179,931	371,337
AVOCADOS	665	500	3,607	2,674	10,090	408	593	2,544	2,376	12,342
CHERRIES SWT &TRT	705	351	3,849	1,661	34,702	645	318	3,819	1,664	130,807
GRAPES	8,742	1,465	113,588	81,223	240,097	10,136	1,910	139,030	120,818	303,291
KIWIFRUIT	899	966	1,888	2,420	5,315	1,249	1,498	2,615	3,380	7,378
MELONS	3,783	4,538	23,949	24,604	223,273	2,079	2,447	12,148	12,507	80,607
PAPAYA	598	605	2,662	2,409	8,274	1,372	1,467	5,877	5,837	19,100
PEACHES & NECTRNS	298	365	1,595	2,634	74,822	433	528	1,605	2,465	71,900
PEARS	12,433	10,150	81,619	68,849	144,426	7,231	7,226	43,546	42,172	84,460
PLUMS/PRUNES	198	176	2,260	2,052	67,193	305	281	2,431	2,143	60,698
STRAWBERRIES	1,540	1,294	8,300	6,993	53,693	3,459	2,742	20,063	17,759	91,674
OTHER NON-CITRUS	1,916	1,263	16,021	18,386	47,787	1,445	1,304	15,671	18,869	62,554
Subtotal:----	90,847	92,180	514,268	505,969	1,474,624	70,555	66,083	415,049	409,922	1,296,148
CAN/PREP FRUIT MT										
CHERRIES, TART CN	165	144	1,803	1,056	6,270	212	199	2,070	1,481	7,406
FRUIT MIXTURES	1,815	1,496	10,090	8,232	26,876	2,097	1,676	11,560	9,655	31,614
MARACHINO CHERRY	341	365	3,338	1,559	7,756	710	799	4,768	3,330	13,925
PEACHES, CANNED	1,383	1,201	6,325	5,415	17,777	1,318	1,236	5,805	5,488	17,250
PINEAPPLE, CANNED	166	402	1,003	1,323	3,339	151	363	874	1,226	3,113
OTHER CANNED FRUI	3,396	2,742	14,457	14,196	45,596	4,198	3,301	17,319	16,791	52,142
OTHER PREP/PRESER	5,944	6,302	22,786	23,924	77,272	5,100	5,712	24,338	26,212	78,708
Subtotal:----	13,211	12,651	59,802	55,706	184,885	13,786	13,284	66,735	64,183	204,158
ORIEO FRUIT MT										
PRUNES, DRIED	4,464	5,216	21,130	23,492	62,548	9,991	10,866	48,046	48,984	139,073
RAISINS, DRIED	8,491	10,630	40,612	47,442	118,824	15,295	17,766	70,505	81,124	200,420
OTHER DRIED FRUIT	1,821	1,013	9,994	7,400	22,411	3,895	3,271	22,878	22,015	55,474
Subtotal:----	14,776	16,859	71,736	78,335	203,783	29,180	31,903	141,429	152,123	394,967
FROZEN FRUIT MT										
BLUE8ERRIES, FROZ	874	489	3,240	2,297	13,785	1,432	991	5,093	4,552	18,713
STRAWBERRIES, FRO	1,595	1,304	6,319	5,400	21,890	2,217	1,653	8,383	6,943	28,346
OTHER FROZEN FRUI	1,314	1,110	9,038	5,693	28,612	2,292	1,622	11,689	7,554	36,707
Subtotal:----	3,783	2,903	18,597	13,390	64,287	5,941	4,265	25,165	19,049	83,766
FRUIT/VEG JUICES KL										
GRAPEFRUIT JU, CN	2,769	4,251	12,502	15,602	63,393	3,012	2,965	10,099	10,470	43,790
ORANGE JUICE, CON	14,089	32,328	70,084	81,891	326,175	9,005	17,074	43,283	50,716	163,945
ORANGE JUICE, NOT	11,496	16,324	46,119	59,858	152,862	8,384	11,089	33,357	41,342	109,185
OTHER JUICES	27,834	29,996	169,503	135,873	489,240	23,428	25,604	115,708	100,408	348,225
Subtotal:----	56,188	82,899	298,208	293,225	1,031,670	43,828	56,731	202,447	202,936	665,145
FRESH VEGETA8LES MT										
ASPARAGUS, FR, CH	447	907	891	1,384	14,344	1,691	2,911	2,960	4,302	51,666
BROCCOLI	11,015	9,888	42,314	38,161	129,396	8,224	8,970	25,901	27,259	84,418
CAULIFLOWER	8,900	6,790	35,375	31,388	107,457	6,255	4,319	22,785	20,301	71,619
CELERY	11,527	11,056	41,631	41,269	116,728	3,190	5,269	13,890	16,726	38,886
LETTUCE, FR CHLD	23,686	25,653	99,633	105,970	286,294	13,254	14,657	45,073	53,382	132,876
ONIONS	30,643	27,850	127,011	121,833	266,097	9,246	8,494	36,613	40,542	83,413
PEPPERS	5,033	5,142	18,794	20,872	58,504	3,638	4,597	14,308	17,153	46,467
TOMATOES	10,812	10,869	44,957	47,739	131,285	6,709	8,684	36,380	37,641	100,428
OTHER VEGETABLES	41,926	44,112	167,346	166,159	681,271	27,180	31,641	115,252	123,944	369,553
Subtotal:----	143,990	142,267	577,951	574,775	1,791,376	79,387	89,543	313,161	341,250	979,327
VEG CANNEO MT										
KETCHUP	2,821	3,506	13,627	14,261	41,143	2,186	3,087	10,132	11,051	30,851
SWEET CORN, CANNE	10,075	12,823	52,007	63,730	168,615	8,110	10,542	41,048	52,040	136,983
TOMATO PASTE	5,891	14,707	34,309	44,033	101,059	4,700	10,038	27,012	32,043	77,393
TOMATO SAUCE	7,376	6,638	27,404	28,003	84,053	7,177	6,703	26,564	27,002	79,868
OTHER CAN VEG	21,144	21,496	83,855	85,741	253,825	26,379	27,325	105,340	111,778	315,358
Subtotal:----	47,308	59,171	211,202	235,768	648,696	48,553	57,696	210,096	233,914	640,453
FROZEN VEGETABLES MT										
FROZEN FRENCH FRY	26,450	37,235	108,443	131,830	350,487	19,273	28,403	79,849	98,103	256,185
FZN SWT CORN	4,477	4,856	21,175	19,629	59,253	4,038	4,316	18,120	17,199	50,829
OTHER POT FZN	1,807	2,552	6,733	12,599	20,772	1,494	1,693	5,358	8,109	17,868
OTHER FZN VEG	5,029	5,299	23,110	21,819	71,480	4,447	4,767	21,387	20,406	63,306
Subtotal:----	37,763	49,942	159,461	185,877	501,991	29,253	39,179	124,714	143,817	388,188
VEG, DEHYD MT										
GARLIC DEHYO	749	910	2,993	3,922	9,622	1,700	2,023	6,868	8,364	21,690
ONIONS, DEHYD.	2,797	2,670	10,838	10,795	30,465	6,318	6,330	25,062	25,508	70,479
POTATOES, DEHYD	4,223	3,618	19,572	15,521	50,241	4,352	3,698	19,101	16,074	57,054
OTHER DEHYD VEG	3,911	5,498	16,837	22,130	55,708	6,539	8,825	25,716	31,360	82,287
Subtotal:----	11,680	12,695	50,240	52,369	146,037	18,910	20,876	76,748	81,306	231,509
TREE NUTS MT										
ALMONDS, UNSHLD	1,300	1,366	7,957	10,440	19,609	2,953	3,305	19,953	25,233	47,853
PISTACHIO, UNSHLO	1,209	311	6,533	2,480	10,231	4,468	1,450	23,011	10,683	36,474
WALNUTS, SHLD	1,188	1,809	10,270	10,702	21,139	4,769	6,216	32,067	36,903	74,538
WALNUTS, UNSHLD	758	631	52,568	48,352	62,144	1,385	1,348	101,487	103,643	121,252
OTHER NUTS	6,041	4,970	33,346	26,303	73,592	15,883	15,867	88,781	77,022	206,474
ALMONDS, SH/PREP	21,900	11,527	109,510	71,207	282,227	61,247	60,660	291,272	359,572	894,225
Subtotal:----	32,397	20,614	220,183	169,485	468,942	90,706	88,847	556,570	613,058	1,380,816
NUSERY PRODUCTS MIXEO										
CUT FLOWERS	0	0	0	0	0	3,031	3,681	13,479	15,102	46,529
OTHER NURSERY	0	0	0	0	0	12,423	13,089	49,998	52,496	154,613
Subtotal:----	0	0	0	0	0	15,454	16,770	63,477	67,598	201,142
HOPS & PRODUCTS MT										
HOP EXTRACT	360	296	1,667	1,389	3,751	6,488	4,691	25,935	23,047	60,224
HOP PELLETS	488	816	2,593	2,551	5,549	2,541	3,790	13,328	12,614	30,441
HOPS, NFSP	101	171	1,417	992	2,860	540	801	7,848	5,145	16,847
Subtotal:----	949	1,283	5,678	4,932	12,160	9,569	9,282	47,112	40,806	107,512
WINE KL										
GRAPE WINES	8,474	12,462	44,841	54,508	157,116	14,938	24,049	80,654	104,319	287,482
OTHER WINE PROD	706	740	4,173	4,416	12,896	941	1,077	5,221	6,132	17,212
Subtotal:----	9,180	13,201	49,015	58,924	170,011	15,880	25,126	85,874	110,451	304,694
MISCELLANEOUS MIXED										
BEER & BEVERAGES	46,769	45,884	241,635	214,722	744,403	27,171	29,642	143,689	132,501	452,774
EDI8LE PREPARATIO	17,295	15,801	67,230	70,604	208,291	64,700	72,234	241,711	308,605	813,101
GINSENG	19	52	623	623	893	2,827	8,145	58,459	51,942	77,527
POTATO CHIPS	3,544	5,275	19,054	19,268	59,922	10,874	13,675	54,763	50,254	166,159
OTHER MISC	0	0	0	0	0	63,526	101,141	273,946	360,259	946,032
Subtotal:----	67,627	67,012	328,542	305,217	1,013,509	169,099	224,838	772,568	903,560	2,455,592
Grand Total:						706,491	824,874	3,319,996	3,606,252	10,019,403

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER - SEPTEMBER YEAR
JAN 97

NAME	QUANTITY					VALUES (1000 DOLLARS)				
GROUP & COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MON LAST YR	CURR MON CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
FRESH FRUIT MT										
APPLES	5,903	4,812	39,878	45,588	175,491	2,950	2,532	14,789	15,586	103,231
AVOCADOS	1,428	1,958	16,306	19,123	23,118	1,069	1,621	14,074	17,443	20,455
BANANAS	327,884	293,709	1,234,848	1,194,958	3,782,707	93,696	88,205	350,583	350,320	1,093,212
CANTALOUPE	42,421	45,858	93,746	99,295	333,902	11,685	15,798	26,889	34,823	106,031
GRAPES	51,187	67,503	64,940	99,983	341,098	62,419	69,221	87,187	134,531	344,799
KIWIFRUIT	427	1,154	2,145	5,484	37,301	361	888	1,873	4,826	24,039
MANGOES	2,760	2,718	7,605	12,862	166,058	2,634	2,238	8,757	12,135	100,039
PEACHES	13,992	15,275	18,256	22,516	41,287	10,934	11,269	15,499	18,882	31,085
PEARS	514	1,231	2,019	2,703	57,371	267	669	4,198	4,585	34,106
PINEAPPLES	9,357	12,488	38,307	48,147	128,547	3,393	6,043	13,495	22,681	47,758
STRAWBERRY	2,484	2,015	4,207	4,220	30,048	7,272	3,768	10,557	7,964	54,522
OTHER MELONS	29,441	31,761	86,681	96,049	327,524	8,916	8,395	25,545	27,104	92,781
OTHER FRUIT	48,144	47,362	187,152	199,114	538,529	24,983	28,998	91,525	110,495	263,393
Subtotal:----	535,942	527,844	1,796,090	1,850,044	5,982,982	230,580	239,645	664,971	761,375	2,315,450
DRIED FRUIT MT										
DRIED APRICOTS	1,695	1,235	6,669	5,292	14,069	3,690	3,438	14,236	14,316	30,639
DRD FIGS & PST	590	96	2,462	1,641	5,044	664	138	4,172	3,633	7,188
OTHER DRIED FRUI	2,500	1,733	9,896	8,322	25,302	3,824	3,353	14,326	15,476	39,682
Subtotal:----	4,785	3,064	19,027	15,255	44,416	8,178	6,929	32,734	33,426	77,510
FROZEN FRUIT MT										
FZN BLUEBERRIES	612	874	2,855	4,474	10,472	906	1,737	3,682	8,831	16,085
FZN STRAWBERRIES	1,133	2,060	2,242	3,015	21,148	975	1,858	1,953	2,891	17,669
OTHER FZN FRUIT	2,432	2,694	7,163	9,449	33,720	3,064	3,146	8,719	11,148	38,421
Subtotal:----	4,177	5,628	12,259	16,938	65,340	4,946	6,741	14,354	22,870	72,175
CANNED/PREP FRUIT MT										
CANNED OLIVES	5,664	5,399	26,481	23,665	72,282	13,944	13,329	64,187	60,929	181,991
CANNED ORANGES	6,895	3,463	13,451	13,180	59,849	7,556	3,227	14,883	13,069	64,148
CANNED PEACHES	1,471	3,071	6,720	14,020	17,062	1,177	2,021	4,772	9,269	11,726
CANNED PINEAPPLE	20,896	26,335	93,603	90,124	306,266	14,319	17,715	56,322	62,580	195,435
MIXED FRUIT	5,906	6,525	17,734	17,155	46,109	5,808	5,981	16,298	16,399	42,609
PREP/PRES FRUIT	6,392	9,049	24,165	32,013	70,663	7,926	10,244	32,255	37,748	88,398
OTHER CANNED FRU	4,020	4,613	17,756	20,438	63,644	4,868	5,565	23,372	26,397	78,573
Subtotal:----	51,243	58,455	199,910	210,595	635,875	55,597	58,080	212,089	226,392	662,879
FRT&VEG JUICE SSE KL										
APPLE JUICE	46,462	97,087	227,282	397,905	856,697	20,930	32,202	94,240	135,281	327,267
FCOJ	82,062	94,733	259,482	501,740	816,744	19,858	19,929	61,640	111,859	215,338
GRAPE JUICE	18,067	8,150	58,869	54,551	218,866	4,548	3,903	15,511	20,515	62,896
PINEAPPLE JUICE	27,084	32,094	109,722	109,074	323,038	7,023	8,956	24,648	31,063	85,004
OTHER JUICES	11,100	21,324	43,564	75,553	238,032	6,632	14,276	29,555	46,005	139,434
Subtotal:----	184,775	253,388	698,920	1,138,823	2,453,377	58,990	79,265	225,594	344,723	829,939
FRESH VEGETABLES MT										
GARLIC	968	832	2,610	1,976	22,438	1,252	1,181	3,057	2,874	27,212
ASPARAGUS	2,329	4,842	12,212	15,926	33,333	5,369	9,233	21,896	27,294	58,156
BELL PEPPER	29,295	32,846	61,163	70,289	165,549	16,569	35,114	46,362	87,662	147,926
CARROTS	11,027	9,278	49,460	46,600	101,943	2,800	2,048	12,363	10,412	24,298
CHILI PEPPER	9,087	8,479	29,479	31,051	104,009	6,492	3,858	20,094	12,249	51,477
CUCUMBERS	50,819	50,543	130,168	145,288	295,907	14,398	12,965	32,412	43,205	115,608
ONIONS	26,945	28,318	58,948	75,005	266,779	19,905	15,648	53,267	51,303	146,632
POTATOES	50,639	31,213	168,850	106,969	489,908	9,803	5,496	32,937	20,036	98,581
SQUASH	26,152	24,615	63,415	68,459	132,970	14,090	14,652	25,848	41,220	67,300
TOMATOES	87,166	94,128	205,915	225,406	724,621	60,686	62,418	158,684	152,908	679,977
OTHER FRESH VEG	48,805	51,459	147,598	149,234	435,237	26,244	32,060	80,729	89,712	234,033
Subtotal:----	343,231	336,553	929,818	936,203	2,772,695	177,607	194,671	487,647	538,875	1,651,200
CANNED/DEHYD VEGE MT										
CND ARTICHOKES	1,855	1,767	7,258	8,100	26,367	3,145	3,063	13,356	13,580	45,213
CND BAMBOO	2,371	2,617	13,116	12,278	27,392	2,284	2,347	12,875	11,240	27,056
CND MUSHROOMS	3,844	6,749	15,859	24,086	56,569	8,510	11,211	36,641	41,937	115,561
CND PIMIENTO	800	762	2,775	3,495	8,171	995	1,003	3,773	4,419	10,493
CND TOMATOES	7,328	5,305	20,507	23,255	48,630	3,388	2,202	9,127	10,054	20,491
CND WATERCHNUTS	1,788	3,179	4,918	7,418	39,633	1,444	2,759	3,716	7,223	31,746
TOMATO PST & SAU	2,466	1,828	10,795	8,142	34,204	3,095	2,639	10,723	9,854	31,648
DRIED MUSHROOMS	170	203	476	557	1,536	1,778	1,836	6,257	5,977	17,049
DRIED TOMATOES	428	586	1,894	3,324	6,106	1,474	2,113	6,878	12,269	23,027
OTHER DEHY VEG	10,416	12,991	40,064	56,866	128,049	10,859	14,037	39,215	55,478	128,352
OTHER CAN VEG	16,647	19,618	68,914	81,065	211,272	16,312	16,446	67,887	72,190	198,012
Subtotal:----	48,113	55,606	186,575	228,584	587,930	53,284	59,656	210,448	244,222	648,648
FROZEN VEGETABLES MT										
BROCCOLI FZN	20,357	12,435	66,904	58,634	181,663	11,228	7,932	38,196	37,401	102,188
CAULIFLOWER FZN	2,922	2,894	11,944	12,307	18,351	1,607	2,159	7,066	9,282	11,559
POTATO FZN	15,331	24,795	58,836	91,278	183,071	9,180	14,841	35,331	55,160	112,893
OTHER VEG FZN	11,125	12,868	65,602	52,883	208,908	9,281	11,001	34,719	42,650	104,601
Subtotal:----	49,735	52,992	203,286	215,102	591,994	31,296	35,932	115,311	144,493	331,241
TREE NUTS MT										
BRAZILS TOT	312	260	1,607	2,322	7,821	831	824	4,217	7,174	16,613
CASHEWS TOT	5,284	5,628	18,476	19,563	61,038	25,243	25,558	91,064	92,308	300,213
COCONUT	3,399	2,897	19,767	14,182	43,090	2,796	2,713	15,634	12,755	35,895
PECANS	4,200	4,296	20,045	16,095	24,814	6,732	6,138	33,973	23,573	53,623
OTHER NUTS	1,264	1,438	8,169	8,956	18,533	5,892	7,084	30,825	36,459	74,881
Subtotal:----	14,459	14,519	68,065	61,117	155,296	41,493	42,317	175,714	172,268	481,224
NURSERY PRODUCTS MIXED										
CARNATIONS	135,446	136,341	455,757	443,228	1,278,692	13,996	12,382	44,221	39,676	129,577
CHRISTMAS TREES	5	0	2,087	2,258	2,126	2	0	18,050	20,220	18,094
CHRYSANTHEMUS	58,374	52,690	237,363	224,962	676,248	7,088	7,232	30,173	31,427	91,982
ROSES	77,005	76,689	242,471	258,196	829,234	15,845	14,981	48,764	49,171	184,874
TULIP BULBS	51	3	86,619	84,383	341,260	4	2	11,555	10,007	42,074
OTHER CUT FLOWER	1,751,793	3,506,617	6,094,404	12,011,246	32,197,264	14,466	17,154	55,707	58,348	186,542
OTHER NURSEY PRO	0	0	0	0	0	26,661	24,568	96,823	97,958	277,365
Subtotal:----	1,022,674	3,772,340	7,118,701	13,024,273	35,324,824	78,061	76,319	305,292	306,806	930,508
HOPS & PRODUCTS MT										
HOPS & PELLETS	1,308	1,553	2,926	3,212	5,365	9,784	11,165	20,331	23,162	37,979
OTHER HOP PROD	78	57	79	59	503	543	519	582	560	3,699
Subtotal:----	1,386	1,611	3,005	3,271	5,867	10,328	11,684	20,913	23,722	41,678
WINE KL										
RED WINE	10,932	11,784	47,153	57,342	150,951	35,745	42,062	184,081	221,011	565,708
SPARKILING WINE	1,326	1,032	15,779	15,048	31,069	13,311	10,316	150,621	153,335	313,991
WHITE WINE	8,354	7,370	38,097	40,047	106,568	23,719	24,874	123,937	141,671	360,701
OTHER WINE PROD	2,666	5,101	11,321	24,927	47,705	7,818	14,083	34,205	62,499	119,764
Subtotal:----	23,278	25,287	112,349	137,365	336,294	80,594	91,336	492,845	578,516	1,360,163
MISCELLANEOUS MIXED										
BEER & BEVERAGES	97,880	106,453	454,291	478,189	1,565,134	82,367	92,229	396,004	425,611	1,365,034
OTHER MISC	0	0	0	0	0	102,524	105,527	414,342	457,643	1,307,570
Subtotal:----	97,880	106,453	454,291	478,189	1,565,134	184,891	197,756	810,345	883,255	2,672,604
Grand Total:						1,015,845	1,100,331	3,768,258	4,280,944	12,075,218

EXPORT NEWS AND OPPORTUNITIES

GSM-102 Credit Guarantee Program: USDA Amends Credit Guarantees to Indonesia, Russia and the West Caribbean Region

Since the last publication, the United States Department of Agriculture (USDA) has increased the allocation of credit guarantees available for the sale of U.S. agricultural commodities to Indonesia and Russia. The allocation to Indonesia was increased from $100 million to $160 million and the allocation to Russia was raised $20 million to $70 million. On February 25, 1997, the USDA decreased by $5 million the allocation of credit guarantees available for sales of U.S. agricultural commodities to the West Caribbean Region--Jamaica and Haiti. The total fiscal year 1997 authorization for coverage to the West Caribbean Region under GSM-102 is now $35 million. All other terms and conditions for the Indonesia, Russia and the West Caribbean Region remain the same.

The GSM-102 program makes available financing for the sales of U.S. agricultural commodities overseas. USDA does not provide financing, but guarantees payments due from foreign banks. USDA typically guarantees 98 percent of the principal and a portion of the interest. The GSM-102 program covers credit terms from 90 days to three years. Under the program, once a firm sale exists, the qualified U.S. exporter applies for a payment guarantee before the date of export. The U.S. exporter pays a fee calculated on the dollar amount guaranteed, based on a schedule of rates applicable to different lengths of credit periods. The CCC-approved foreign bank issues a dollar-denominated, irrevocable letter of credit in favor of the U.S. exporter, ordinarily advised or confirmed by the financial institution in the United States agreeing to extend credit to the foreign bank. The U.S. exporter may negotiate an arrangement to be paid as exports occur by assigning the U.S. financial institution the right to proceeds that may become payable under the guarantee, and later presenting required documents to that financial institution. Such documents normally include a copy of the export report. If a foreign bank fails to make any payment as agreed, the exporter or the assignee may file a claim with USDA for the amounts due and covered by the guarantee. USDA will pay the U.S. bank and will take on the responsibility of collecting the overdue amount from the foreign bank.

The table on page 8 presents FY 1997 allocations by country and product along with registrations through March 7, 1997, for various horticultural commodities and products. Repayment terms vary under the program, from 90 days to 3 years. *Cautionary information for use of the accompanying table: The table reflects only exporter applications for guarantees that have been entered into the GSM 102 computerized system. At any given time, exporter applications are in process, and not all of those received have been entered into the system. Moreover, all applications are initially entered into the system on a provisional basis until price reviews have been completed, the guarantee fee has been received, and the written guarantee has been issued. Thus, some applications now in the system may in the future be removed, and the commodity balances correspondingly increased.* For details on terms and authorizations, see the footnotes to the table.

Note: The GSM will consider requests to establish a GSM-102 program for a country or region or amend an authorized program to include horticultural commodities and products which are currently not eligible. (For further information on the GSM-102 program for horticultural commodities, contact Yvette Wedderburn Bomersheim, 202-720-9903).

Supplier Credit Guarantee Program: Extends Credit Guarantees to Jamaica and Southeast Asia and Amends Credit Guarantees to Mexico and Guatemala

USDA has authorized $5 million in credit guarantees for sales of U.S. agricultural commodities to Jamaica under the Supplier Credit Guarantee Program (SCGP) for 1997. The SCGP is an adaptation of the GSM-102 program and is designed to assist exporters of U.S.

agricultural commodities who wish to provide relatively short-term credits to their importers. Exporters may apply for credit guarantees on a first-come-first-served basis to cover the following horticultural products: fresh fruits, fresh vegetables, canned vegetables, frozen vegetables, wine and brandy, dried fruits, tree nuts, and potatoes.

On February 13, USDA authorized $35 million in credit guarantees for sales of U.S. agricultural commodities to the Southeast Asia Region--Indonesia, Malaysia, Philippines, and Singapore--under the SCGP for fiscal year 1997. Credit guarantees cover sales of the following horticultural products: canned fruit, canned vegetables, dried fruit, fresh fruits, fresh vegetables, frozen fruits, frozen vegetables, tree nuts, potatoes, and wine and brandy.

On March 18, USDA amended the allocation of credit guarantees previously available for sales of U.S. agricultural commodities to Guatemala under the SCGP for fiscal year 1997 to also include El Salvador and Panama as eligible destinations in the Central America Program. The total allocation for this newly established Central America SCGP is $7.9 million. Eligible horticultural commodities for the Central America SCGP, in addition to those previously announced under the Guatemala SCGP now include: tree nuts, dried fruits, canned fruit, fresh vegetables, wine, brandy, and beer. All other terms and conditions remain the same as under the Guatemala SCGP.

Also on March 18, USDA amended the maximum terms of coverage for credit guarantees available under the Mexico SCGP for fiscal year 1997 from 90 days to 180 days.

The new SCGP is unique because it covers short-term financing extended directly by U.S. exporters to foreign buyers and requires that the importers sign a promissory note in case of default on the CCC-backed payment guarantee. The SCGP emphasizes high-value and value-added products, but may include commodities or products that also have been programmed under the GSM-102 program.

Note: The GSM will consider requests to establish a SCGP for a country or region or amend an authorized program to include horticultural commodities and products which are currently not eligible. (For further information on the SCGP for horticultural commodities, contact Yvette Wedderburn Bomersheim, 202-720-9903).

FY 1997 GSM-102
CREDIT GUARANTEE COVERAGE 1/

Country/Commodity	Announced Allocation 12/ In Millions of Dollars)	Exporter Applications Received (In Millions of Dollars)	Balance In Millions of Dollars)
ANDEAN REGION 2/	**200.0**	**65.6**	**134.4**
Dried fruit 7/		0.8	
Fresh fruit 6/		0.0	
Frozen fruit		0.0	
Tree nuts 5/		0.0	
BRAZIL	**75.0**	**19.4**	**55.6**
Fresh fruit 6/		4.6	
Potatoes		0.0	
CENTRAL AMERICA REGION 4/	**40.0**	**32.3**	**7.7**
Potatoes		0.0	
CHINA	**100.0**	**5.1**	**94.9**
Fresh fruit (apples & cherries)		0.0	
Potatoes		0.0	
CZECH REPUBLIC	**10.0**	**0.0**	**10.0**
Fresh fruit 6/		0.0	
Potatoes		0.0	
EAST AFRICA REGION 11/	**35.0**	**8.8**	**26.2**
Potatoes		0.0	
EAST CARIBBEAN REGION 3/	**50.0**	**21.9**	**28.1**
Fresh fruit 6/		0.0	
EGYPT	**100.0**	**85.8**	**14.2**
Fresh fruit 6/		0.0	
Potatoes		0.0	
INDIA	**15.0**	**0.0**	**15.0**
Tree nuts 5/		0.0	
INDONESIA	**100.0**	**82.5**	**17.5**
Dried fruit 7/		0.0	
Fresh fruit 6/		0.0	
Potatoes		0.0	
Tree nuts 5/		0.0	
MEXICO	**800.0**	**600.4**	**199.6**
Fresh fruit 6/		0.0	
Hops and Products		0.0	
Potatoes		0.0	
Tree nuts 5/		0.0	
PAPUA NEW GUINEA	**1.0**	**0.0**	**1.0**
Canned vegetables		0.0	
POLAND	**25.0**	**0.0**	**25.0**
Potatoes		0.0	

FY 1997 GSM-102
CREDIT GUARANTEE COVERAGE 1/

Country/Commodity	Announced Allocation 12/ In Millions of Dollars)	Exporter Applications Received (In Millions of Dollars)	Balance In Millions of Dollars)
RUSSIA	**70.0**	**59.6**	**10.4**
Canned fruit 4/		0.06	
Canned vegetables 8/		0.06	
Dehydrated instant soup		0.0	
Fresh fruit 6/		0.6	
Fresh vegetables 9/		0.08	
Frozen vegetables		0.0	
Frozen concentrated orange juice		0.0	
Potatoes		0.0	
Tree nuts 5/		0.0	
SLOVAKIA	**10.0**	**0.0**	**10.0**
Frozen concentrated orange juice		0.0	
SOUTHERN AFRICA REGION 10/	**50.0**	**0.0**	**50.0**
Potatoes		0.0	
TUNISIA	**30.0**	**2.6**	**27.4**
Tree nuts 5/			

1/ Coverage announced for FY 1997 as of March 7, 1997 as detailed in FAS Program Announcements (tel: 202-690-1621 for information); unless otherwise noted, terms are FOB, 90-days to 3 years. 2/ Barbados, Grenada, Guyana, St. Lucia, St. Vincent, and the Grenadines, Surinam, Trinidad and Tobago. 3/ Bolivia, Colombia, Ecuador, Chile, Peru, and Venezuela. 4/ Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and Panama. 5/ almonds, pecans, pistachios, walnuts, Hazelnuts. 6/ Apples, apricots, avocadoes, blueberries, cherries, grapes, grapefruit, kiwifruit, lemons, melons, (watermelons, cantaloup, and honeydew), nectarines, oranges, pears, plums, peaches, raspberries, strawberries, tangerines. 7/ raisins, prunes, dates, figs, apples. 8/ asparagus, beans, carrots, corn, peas, tomatoes, tomato paste. 9/ asparagus, beans, broccoli, carrots, cauliflower, celery, corn, garlic, lettuce, onions, peppers, potatoes, and tomatoes. 10/Angola, Botswana, Burundi, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Rwanda, Sudan, Seychelles, South Africa, Swaziland, Tanzania, Zambia, and Zimbabwe. 11/ Kenya and Uganda. 12/ All commodities, including those not listed.

FY 1997
SUPPLIER CREDIT COVERAGE 1/

Country/Commodity	Announced Allocation 10/ In Millions of Dollars)	Exporter Applications Received (In Millions of Dollars)	Balance In Millions of Dollars)
GUATEMALA	**10.0**	**2.1**	**7.9**
Fresh fruit 3/		0.0	
MEXICO	**30.0**	**0.8**	**29.2**
Dried fruit 5/		0.0	
Canned fruit 4/		0.0	
Canned vegetables 6/		0.0	
Fresh fruit 3/		0.0	
Fresh vegetables 7/		0.0	
Frozen vegetables 8/		0.0	
Potatoes		0.0	
Tree nuts 2/		0.0	
Wine; Brandy		0.0	
JAMAICA	**5.0**	**0.0**	**5.0**
Canned fruit 4/		0.0	
Dried fruit 5/		0.0	
Fresh fruit 3/		0.0	
Potatoes		0.0	
Tree nuts 2/		0.0	
Canned vegetables 6/		0.0	
Fresh vegetables 7/		0.0	
Frozen vegetables 8/		0.0	
SOUTHEAST ASIA	**35.0**	**0.0**	**35.0**
Canned fruit 4/		0.0	
Dried fruit 5/		0.0	
Fresh fruit 3/		0.0	
Frozen fruit 9/		0.0	
Potatoes		0.0	
Tree nuts 2/		0.0	
Canned Vegetables 6/		0.0	
Fresh vegetables 7/		0.0	
Frozen vegetables 8/		0.0	
Wine; Brandy		0.0	

1/ Coverage announced for FY 1997 as of March 7, 1997 as detailed in FAS Program Announcements (tel: 202-690-1621 for information. 2/ almonds, pecans, pistachios, walnuts, hazelnuts. 3/ Apples, apricots, avocadoes, blueberries, cherries, grapes, grapefruit, kiwi, lemons, melons, nectarines, oranges, pears, plums, peaches, raspberries, strawberries, tangerines. 4/ peaches, pears, cocktail, tart cherries. 5/ raisins, prunes, dates, figs. 6/ asparagus, beans, carrots, corn, peas, tomatoes, tomato paste. 7/ asparagus, beans, broccoli, carrots, cauliflower, celery, corn, garlic, lettuce, onions, peppers, potatoes, tomatoes. 8/ beans, broccoli, carrots, corn, spinach. 9/ blackberries, blueberries, raspberries, strawberries. 10/ All commodities, including those not listed.

U.S. dried fruit exports set a record in 1996

The U.S. dried fruit industry has been expanding exports in recent years, reaching a record $403 million in 1996, up from $279 million in 1989. Raisin exports accounted for much of the increase -- 52 percent of dried fruit export value in 1996. Prunes, the second largest export item in this group, grew to $139 million in 1996, compared to $101 million in 1989. Other important dried fruit exports included dates, apples, figs, and mixtures of dried fruits.

Japan remains the largest importer of U.S. dried fruits, with shipments valued at $80 million in 1996, followed by the United Kingdom at $66 million. Other important markets include Canada, Germany, Scandinavian countries, the Netherlands and Italy. Sales have also expanded significantly in other Asia countries in recent years, mainly to Hong Kong, Taiwan, and Singapore. The Market Access Program (MAP) has contributed significantly to the expansion in overseas markets in recent years.

U.S. horticultural exports to Mexico posted solid gains in 1996

After falling sharply in 1995 in the wake of the December 1994 peso devaluation, U.S. horticultural exports to Mexico registered a healthy recovery in 1996. Horticultural shipments to Mexico in 1996 were valued at $402.5 million, up 19 percent from the preceding year. Clearly, U.S. horticultural exports still have considerable ground to make up before they recover to the level reached before the peso devaluation. Nevertheless, taking into account the 1994 trade performance, 1996 marked the second best year on record for U.S. horticultural exports to Mexico. The outlook is for a sustained, gradual expansion in U.S. horticultural product exports. Continued MAP-funded market development and promotion activities will remain critical in helping U.S. horticultural product sales to rebound in the Mexican market. In addition, the Supplier Credit Guarantee Program is expected eventually to assist in boosting shipments.

U.S. imports of horticultural products from Mexico were up as well, but by a smaller percentage increase. Imports totaled $2.6 billion, an increase of 12 percent from the previous year and another record.

Brazil's 1996 orange juice production and exports revised up

Brazil's total orange juice production estimate for 1996 (Brazilian marketing year 1996/97) is increased 88,000 tons to 1.14 million tons (65 degrees brix). The higher estimate is based on increased orange production and processing estimates for the Sao Paulo commercial orange area.

The U.S. agricultural officer in Sao Paulo has increased the 1996 (harvest began mid-1996 and extended through early 1997) orange crop estimate from 357 to 369 million boxes (40.8 kilos). Although there was a drop in the use of inputs, such as fertilizer and pesticides, by financially-strapped orange producers in 1996, favorable weather from September to December benefitted the development of the fruit. Sao Paulo's oranges for processing estimate for 1996/97 is increased from 260 to 269 million boxes based on the larger harvest. According to industry sources, the crushing season is over for almost all processing plants in Sao Paulo.

Orange juice extraction rates in Sao Paulo are revised from 4.06 to 4.10 kilograms of FCOJ (65 degrees brix) per box due to frequency of rains in early 1997.

The marketing year 1996/97 (July/June) total Brazil orange juice export forecast is revised from 1.05 million tons to 1.095 million tons based on higher exports to date than earlier expected. The MY 1996/97 Brazilian FCOJ ending stocks estimate is increased to 200,000 tons. See FCOJ supply/demand table on the next page.

BRAZIL: SUPPLY AND DISTRIBUTION OF ORANGES AND FCOJ 1/

	1993	1994	1995	1996
Oranges, Sao Paulo	Million Boxes 2/			
Production 3/	306	311	357	369
Fresh Consumption	55	62	92	98
Fresh Exports	2	3	2	2
Processed	249	246	263	269
FCOJ, Brazil	1,000 Metric Tons, 65 Degrees Brix 4/			
Beginning Stocks 5/	105	105	155	172
Production				
Sao Paulo	1,065	1,110	1,062	1,108
Other States	53	16	23	35
Total	1,118	1,126	1,085	1,143
Exports 6/				
Sao Paulo	1,047	1,038	1,027	1,060
Other States	53	16	23	35
Total	1,100	1,054	1,050	1,095
Consumption	18	22	18	20
Ending Stocks	105	155	172	200
FCOJ Yields (kg/box)	4.23	4.50	4.02	4.10

1/ Harvesting and processing usually begin in late April or early May. Marketing season for FCOJ begins on July 1 of year indicated.

2/ 40.8 kilograms or 90 pounds.

3/ Includes oranges produced in Sao Paulo's commercial citrus zone, plus tangerines used for processing.

4/ One metric ton at 65 degrees Brix equals 344.8 gallons at 42 degrees Brix, or 1,405.88 gallons at single strength equivalent.

5/ Sao Paulo stocks.

6/ Includes tangerine juice.

WORLD TRADE SITUATION AND POLICY UPDATES

Mexico's anti-dumping investigation on U.S. apples

On March 6, 1997, Mexico's trade ministry initiated an anti-dumping investigation of imports of U.S. Red and Golden Delicious apples. The investigation responds to a petition filed by the Chihuahua State Fruit Growers Association, which alleges that U.S. apples are being sold below their production costs, thus damaging Mexican apple producers. The investigation will cover imports during the period January 1 to June 30, 1996. The U.S. apple industry has 30 business days from the date of publication (March 6, 1997) to make comments. A preliminary determination can be expected within 130 business days. Should the preliminary determination fail to conclude the investigation, then the submission of additional information will be requested and a public hearing held. The Northwest Horticultural Council, in close coordination with the Northwest Fruit Exporters, U.S. Apple Association, and representatives of the U.S. Government, is working to address the Mexican apple growers allegations under Mexico's anti-dumping proceedings.

Mexico is the second largest customer for U.S. apple exports. From July to December 1996 (marketing year is July-June), U.S. apple exports to Mexico reached 20,262 tons, 2 percent ahead of shipments during the same period in 1995. However, U.S. exports to Mexico are hampered by a costly and problematic inspection program (work plan), which limits imports to apples from the Pacific Northwest states. Despite approval for eight additional states, only Washington, Oregon, and Idaho are participating in the export program because the costs of maintaining Mexican inspectors are prohibitive for the other states.

Argentina maintains technical barriers to U.S. produce

Argentina continues to ban imports of all fruits and vegetables from certain important producing areas of California, and to maintain a blanket embargo on Florida citrus, ostensibly due to phytosanitary concerns. The only recent success in gaining access for U.S. horticultural exports, after many months of effort, occurred last December when USDA secured the lifting of the ban for 17 California counties. U.S. exports of fresh fruit to Argentina in calendar year 1996, constrained by the ban on California that was in effect almost the entire year, were held to only $2 million. This year, however, Washington apples are making substantial gains. Meanwhile, U.S. imports of fresh fruit (primarily apples and pears) from Argentina in 1996 were valued at $12 million.

EU considers new citrus import requirements

The European Union (EU) continues to consider the establishment of new quarantine standards for the importation of fresh citrus fruit from third countries. In cooperation with the Florida grapefruit industry, USDA recently provided technical documentation on the issue to the EU Commission. This material supported the case that Caribbean fruit flies are effectively excluded from citrus shipments and that citrus canker does not exist in commercial citrus grove regions. The EU's standing Phytosanitary Committee has reportedly taken this information under consideration. In late March or early April, the Committee will have an informal vote on its new citrus phytosanitary policy. If no objections are registered, the EU would then notify the WTO of its proposed policy change. Exports of Florida grapefruit to the EU last year exceeded $60 million.

Canadian government announces final determination of dumping of fresh garlic from the People's Republic of China

On February 19, 1997, Revenue Canada made a final determination of dumping of fresh garlic from China. The margin of dumping ranged up to 91 percent with a weighted average margin of 70 percent, when expressed as a percentage of the

normal value. During the period of investigation (POI), over six million kilograms or 6,000 tons of garlic were imported from China at an average selling price of $0.58 CDN per kilogram. The weighted average of the normal value of garlic sold domestically during the POI was $1.91 CDN per kilogram (equivalent to a difference of about $1.33 CDN per kilogram). A comparison of the normal value and the export prices revealed that 96 percent of the garlic imported during the POI were dumped.

Chinese exports of fresh garlic into Canada have cut deeply into U.S. market share in recent years. The United States was the leading supplier of fresh garlic to Canada as recently as 1992. However, since that time, U.S. market share has declined chiefly because of increased Chinese exports. The recent dumping announcement by Revenue Canada is expected to go a long way toward helping restore U.S. market share in Canada.

World Update on Table Grapes and U.S. Export Performance

Grape exports from selected countries in 1996 reached a record 1.76 million tons, 11 percent above 1995 shipments. Chile and Italy accounted for the bulk of the increase in grape exports. U.S. sales were down slightly as a sharp decrease in shipments to Canada more than offset expanded sales to Hong Kong and Taiwan. U.S. exports slowed at the end of 1996 because of a smaller than anticipated pack, and diversion of grapes to meet increased demand for wine and raisins. No significant change in Southern Hemisphere grape exports is expected in 1997.

Southern Hemisphere Outlook

Chile's exports expected down slightly in 1997

Table grape production in 1997 is forecast at 865,000 tons, unchanged from the 1995 output. Although harvested area is up, a drought in most growing areas affected yields and quality. Lack of snowfall last winter, for the second year in a row, has severely depleted reservoirs in the third and fourth Regions and in Regions five through seven. The insufficient water supplies are reportedly affecting the quality of the red grape varieties; grapes are splitting and the minimum size of the grapes is not being obtained in some areas.

In recent years, table grape production has been adversely affected by the continuous revaluation of the peso against the dollar and increasing production costs. It is estimated that labor accounts for over 60 percent of production costs. These factors combined have led to a 40 percent decline in the competitiveness of Chilean fruit production in the last 4 years. As a result, despite receiving higher export prices last season, many farmers argue their production costs are increasing at a faster rate.

Chile is the premier Southern Hemisphere exporter of table grapes. Chile's grape exports in 1997 are forecast at 485,000 tons, down slightly from 1996, as unfavorable weather in some areas is causing some quality problems. Less grapes may be available for export because of stricter quality controls for export. Chile's grape exports in 1996 reached a record 490,000 metric tons, 11 percent above the previous year's shipments. The United States is Chile's largest market (54 percent of total shipments), although sales declined by 2 percent in 1996. Sales in 1996 were up to the Netherlands and the United Kingdom, the second and third largest markets. Brazil and Hong Kong are Chile's fastest growing markets. For example, exports to Hong Kong have expanded from 3,220 tons in 1990 to 24,497 tons in 1996. Exports to Brazil have expanded from 6,953 tons in 1990 to 24,909 tons in 1996. Average export prices to all destinations through October 1996 rose slightly to $1,074 per metric ton FOB, a 2 percent increase over the same period last year. Strong demand combined with stricter quality control helped boost prices. Chile is expected to export grapes to Taiwan for the first time in 1997. Taiwan has granted Chile a 1996/97 import quota of 73,170 cartons (14,634 tons) of table grapes. Chile is expected to fill the quota.

South Africa's grape production and exports expected to rise in 1997

Table grape production in 1997 is forecast at 165,000 tons, up 6 percent from 1996 because of favorable weather and an increase in harvested area. South Africa continues to increase planted area in response to growing domestic and foreign demand. South Africa's grape exports in 1997 are forecast at 105,000 tons, up 5 percent from 1996. South Africa's major export markets are Belgium, Germany, and the United Kingdom.

Argentine grape exports unchanged

Argentine exports in 1997 are expected to approximate the 1996 level. The Netherlands and Brazil are Argentina's principal markets, with each respectively accounting for 44 and 42 percent of Argentina's total shipments in 1996.

Revised Northern Hemisphere

It is too early to make reliable forecasts for the Northern Hemisphere countries for calendar year 1997.

Data for the Northern Hemisphere have been revised since the December issue of the World Horticultural Trade & U.S. Export Opportunities. Grape production in the Northern Hemisphere for 1996 has been reduced from 7.2 million to 7.1 million tons. Northern Hemisphere exports for 1996 were reduced from 1.2 million to 1.1 million tons. The United States and Italy account for these changes.

U.S. grape exports in 1996 totaled 215,009 tons, 2 percent below 1995 shipments. Expanded shipments to Taiwan and Hong Kong nearly offset a sharp reduction in sales to Canada, the number one U.S. market. Sales to Canada in 1996 totaled 86,965 tons, 15 percent below 1995 shipments.

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TABLE GRAPES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS, NET WEIGHT)

COUNTRY/YEAR 1/	TOTAL Production	TOTAL Imports	TOTAL SUPPLY	Exports, Fresh Only	Domestic Fresh Consump	For Processing	Withdrawal From Market
NORTHERN HEMISPHERE COUNTRIES							
European Union							
France							
1994	79,100	156,900	236,000	13,400	222,600	0	0
1995	136,800	114,200	251,000	19,200	231,800	0	0
1996	126,000	125,000	251,000	21,000	230,000	0	0
1997	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Greece							
1994	363,800	439	364,239	102,785	181,982	61,149	18,279
1995	312,492	400	312,892	93,800	147,348	70,000	1,744
1996	350,000	400	350,400	100,000	170,400	70,000	10,000
1997	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Italy							
1994	1,524,000	11,000	1,535,000	660,000	625,000	250,000	0
1995	1,412,000	9,000	1,421,000	506,000	600,000	315,000	0
1996	1,450,000	10,000	1,460,000	610,000	600,000	250,000	0
1997	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Spain							
1994	300,800	14,200	315,000	93,700	201,300	20,000	0
1995	391,700	12,000	403,700	91,600	277,100	35,000	0
1996	431,600	5,000	436,600	100,000	296,600	40,000	0
1997	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SUBTOTAL European Union							
1994	2,267,700	182,539	2,450,239	869,885	1,230,882	331,149	18,279
1995	2,252,992	135,600	2,388,592	710,600	1,256,248	420,000	1,744
1996	2,357,600	140,400	2,498,000	831,000	1,297,000	360,000	10,000
1997	N/A	N/A	N/A	N/A	N/A	N/A	N/A
OTHER NORTHERN HEMISPHERE COUNTRIES							
Japan							
1994	245,700	9,650	255,350	2	227,348	28,000	0
1995	250,000	8,629	258,629	9	231,620	27,000	0
1996	250,600	8,000	258,600	5	232,595	26,000	0
1997	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mexico							
1994	155,000	45,000	200,000	41,500	158,500	0	0
1995	160,000	20,000	180,000	83,000	97,000	0	0
1996	150,000	25,000	175,000	60,000	115,000	0	0
1997	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Turkey							
1994	3,450,000	7	3,450,007	26,258	1,711,875	1,711,874	0
1995	3,550,000	19	3,550,019	28,578	1,760,721	1,760,720	0
1996	3,550,000	0	3,550,000	28,000	1,761,000	1,761,000	0
1997	N/A	N/A	N/A	N/A	N/A	N/A	N/A
United States							
1994	733,600	323,960	1,057,560	218,855	838,705	0	0
1995	773,700	349,666	1,123,366	219,329	904,100	0	0
1996	759,600	359,826	1,119,426	215,009	904,417	0	0
1997	N/A	N/A	N/A	N/A	N/A	N/A	N/A

TABLE GRAPES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS, NET WEIGHT)

COUNTRY/YEAR 1/	TOTAL Production	TOTAL Imports	TOTAL SUPPLY	Exports, Fresh Only	Domestic Fresh Consump	For Processing	Withdrawal From Market
SUBTOTAL OTHER NORTHERN HEMISPHERE							
1994	4,584,300	378,617	4,962,917	286,615	2,936,428	1,739,874	0
1995	4,733,700	378,314	5,112,014	330,916	2,993,441	1,787,720	0
1996	4,710,200	392,826	5,103,026	303,014	3,013,012	1,787,000	0
1997	N/A	N/A	N/A	N/A	N/A	N/A	N/A
TOTAL NORTHERN HEMISPHERE COUNTRIES							
1994	6,852,000	561,156	7,413,156	1,156,500	4,167,310	2,071,023	18,279
1995	6,986,692	513,914	7,500,606	1,041,516	4,249,689	2,207,720	1,744
1996	7,067,800	533,226	7,601,026	1,134,014	4,310,012	2,147,000	10,000
1997	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SOUTHERN HEMISPHERE COUNTRIES							
Argentina							
1994	58,100	3,866	61,966	4,909	25,057	32,000	0
1995	63,992	3,000	66,992	8,000	24,400	34,620	0
1996	45,000	1,950	46,950	11,400	21,550	14,000	0
1997	50,000	2,000	52,000	11,500	26,000	14,500	0
Chile							
1994	855,000	0	855,000	458,700	90,000	306,300	0
1995	855,000	0	855,000	443,000	91,000	321,000	0
1996	865,000	0	865,000	490,000	91,500	283,500	0
1997	865,000	0	865,000	485,000	91,800	288,200	0
South Africa, Republic of							
1994	143,463	0	143,463	93,755	46,708	3,000	0
1995	156,000	0	156,000	90,000	45,500	3,500	0
1996	156,000	0	156,000	100,000	53,000	3,000	0
1997	165,000	0	165,000	105,000	56,000	4,000	0
SUBTOTAL SOUTHERN HEMISPHERE							
1994	1,056,563	3,866	1,060,429	557,364	161,765	341,300	0
1995	1,074,992	3,000	1,077,992	541,000	160,900	359,120	0
1996	1,066,000	1,950	1,067,950	601,400	166,050	300,500	0
1997	1,080,000	2,000	1,082,000	601,500	173,800	306,700	0
TOTAL SELECTED COUNTRIES							
1994	7,908,563	565,022	8,473,585	1,713,864	4,329,075	2,412,323	18,279
1995	8,061,684	516,914	8,578,598	1,582,516	4,410,589	2,566,840	1,744
1996	8,133,800	535,176	8,668,976	1,735,414	4,476,062	2,447,500	10,000
1997	N/A	N/A	N/A	N/A	N/A	N/A	N/A

1/Calendar year for all countries. EU data include intra-EU trade.

U.S. TABLE GRAPE EXPORTS
1992-1996 1/
(METRIC TONS)

DESTINATION	1992	1993	1994	1995	1996
SELECTED COUNTRIES					
Canada	105,801	111,282	102,703	102,903	86,965
Hong Kong	19,710	18,267	21,082	28,159	38,632
Taiwan	14,995	12,898	15,107	12,784	16,359
Philippines	5,531	5,955	8,946	9,034	12,703
Mexico	2,562	9,001	24,379	11,188	10,859
Malaysia	2,676	4,018	4,228	6,470	5,887
Indonesia	2,629	4,357	4,038	5,020	4,778
United Kingdom	7,635	5,023	3,931	7,387	4,678
Singapore	5,587	6,655	5,945	5,828	4,675
New Zealand	2,668	2,426	4,362	3,630	4,006
ALL OTHERS	20,037	23,931	24,134	26,926	29,787
Grand Total	189,831	203,813	218,855	219,329	215,009

1/ Calendar year data.
Source: U.S. Census data

U.S. TABLE GRAPE IMPORTS
1992-1996 1/
(METRIC TONS)

ORIGIN	1992	1993	1994	1995	1996
SELECTED COUNTRIES					
Chile	278,047	279,205	280,910	263,824	292,896
Mexico	37,056	41,305	41,074	80,492	60,033
South Africa	0	0	567	3,004	3,218
ALL OTHERS	1,816	957	1,409	2,346	3,679
Grand Total	316,919	321,467	323,960	349,666	359,826

1/ Calendar year data.
Source: U.S. Census data

CHILEAN TABLE GRAPE EXPORTS
1992-1996 1/
(METRIC TONS)

DESTINATION	1992	1993	1994	1995	1996
SELECTED COUNTRIES					
United States	279,513	282,699	277,122	264,484	258,632
Netherlands	69,637	64,971	61,895	53,818	62,741
United Kingdom	15,575	16,801	24,271	28,021	34,128
Brazil	N/A	3,170	5,237	13,507	24,909
Hong Kong	7,372	8,471	9,122	15,781	24,497
Peru	N/A	N/A	N/A	6,132	9,050
Germany	5,968	6,912	7,314	5,297	6,576
Mexico	10,965	19,504	25,245	8,039	6,055
Saudi Arabia	8,590	7,114	6,441	5,261	5,690
Belgium	4,651	4,949	5,019	5,813	4,822
Japan	4,002	4,181	4,538	4,782	3,965
ALL OTHERS	23,081	21,905	32,541	32,065	48,935
Grand Total	429,354	440,677	458,745	443,000	490,000

1/ Calendar year data.
Source: Attache Report CI7001

Macadamia Situation and Outlook

Macadamia nut production and exports continue to increase due to strong international demand. Macadamia exports by selected countries in 1996/97 are forecast to increase 16 percent to a record 34,345 metric tons (in-shell basis). Australia is by far the world's largest exporter of macadamias, accounting for 44 percent of the world total. Kenya ranks as the second largest exporter of macadamias and the United States third. Although the United States is the world's largest producer of macadamias, it is also a major importer of macadamias to meet domestic needs. World demand for macadamias continues to increase. Consumers throughout the world purchase macadamias as a snack, for use in cooking, and as an ingredient in bakery goods, ice cream, and confectionery products.

United States

U.S. macadamia production in 1996/97 is estimated at a record 25,000 tons (in-shell wet weight), 8 percent above the previous year's output due to higher yields. This production, exclusively from Hawaii, accounts for 39 percent of world production.

Exports in 1996/97 are forecast to rise 13 percent. The United States exports only prepared or preserved macadamias. Japan is the most important market, accounting for more than half of total U.S. shipments.

U.S. imports in 1996/97 are forecast to fall 6 percent below the 1995/96 level. Shelled macadamias account for 99 percent of total U.S. imports. Australia, Guatemala, Kenya, South Africa, and Costa Rica are major suppliers of imports of shelled macadamias to the United States.

During the past 21 years, U.S. per capita consumption of macadamias has fluctuated according to the product's availability. From 1975/76 to 1995/96, per capita consumption of macadamias rose 4 percent annually. In 1995/96, per capita consumption was 50 grams (0.11 pounds).

Australia

Australia is the world's second largest macadamia producer, after the United States, accounting for 36 percent of selected country production. Australian production has doubled in the last 5 years. Some sources expect Australia to produce a 30,000-ton crop by the year 2000 and become the world's largest producer.

Australia is the world's largest macadamia exporter. The Australian macadamia nut industry is highly export-oriented, exporting 12,727 tons in 1995/96. Exports in 1996/97 are forecast at record 15,000 tons, 18 percent above the previous year's shipments. The United States is Australia's single largest export market accounting for about 27 percent of total 1995/96 exports. The Asian market, however, is the largest regional market, accounting for about 45 percent of Australian exports, of which Japan and Hong Kong are the largest single markets. The European Union has also increased its market share to 25 percent.

Kenya

Kenya has emerged as the world's third largest producer and second largest exporter of macadamias. Many Kenyan farmers are embracing macadamia cultivation as an alternative to coffee

and other crops. Most growers are interested in adding more trees to their orchards. However, the tree nut marketing companies, producers, and extension workers have complained about shortages of seedlings for planting.

Greater competition among Kenyan tree nut marketers has helped to raise prices to macadamia farmers and to improve the payment system. As of 1996/97, 3 tree nut companies now operate in Kenya and pay cash upon delivery of the product. In 1992/93, only 1 processor bought macadamias from growers and frequently delayed payment.

Better prices for macadamias have lead to unorthodox ways of harvesting. Some farmers shake trees to obtain more nuts. This procedure has resulted in harvesting of immature nuts and is likely to compromise quality. Conventional harvesting involves letting mature nuts drop to the ground for recovery. Shaking the trees interferes with the flowers, leaves, and branches and reduces future yields.

Kenya's macadamia nut exports in 1996/97 are forecast at a record 5,080 tons, 14 percent above the previous season's shipments. Germany and Japan are the 2 largest markets, accounting for more than 70 percent of Kenya's total exports.

South Africa

The 1996/97 harvest is expected to increase approximately 22 percent to 4,780 tons as a prolonged drought came to an end. Similarly, exports in 1996/97 are forecast to rise 24 percent to 4,400 tons. In 1995/96, the Netherlands and the United States were the 2 principal customers of South African macadamias accounting for 35 and 34 percent, respectively. Hong Kong accounted for 16 percent of the total. Devaluation of the South African rand by 20 to 30 percent stimulated exports in 1995/96.

Costa Rica

In 1996/97, production of macadamias in Costa Rica is forecast to grow 9 percent to 2,500 tons. Exports are projected to increase 11 percent to 2,250 tons. Almost 100 percent of macadamias exported by Costa Rica move in bulk, though the two processing factories are trying to find markets for their line of consumer-ready products. The United States is Costa Rica's major export market.

In 1995/96, the industry implemented a new pricing system for producers based on the quality of nuts. Growers now remove poorer quality nuts before sending them to processors. This new approach has translated into better processing yields and lower costs to processors. Processors now have to do less selection of nuts, because the new system penalizes producers who deliver poor quality nuts and rewards farmers who supply higher quality nuts. In the past, workers at the plants removed inferior quality macadamias.

Brazil

In 1996/97, Brazil's output of macadamias is expected to rise 11 percent to 1,100 tons due to good weather. Exports are forecast to increase about 7 percent to 130 tons.

Various factors affect Brazilian production of macadamias. The government provides no support to the industry. Prices to growers have fallen in recent years. Inadequate financing, due to Brazil's high interest rates, has made it very difficult for farmers. Poor management of orchards also hampers the macadamia industry.

Though the third largest consumer among the surveyed countries, Brazil's domestic consumption of macadamias has increased slowly. Lack of consumer awareness is prevalent. Competition provides domestic Brazil nuts, cashews, and peanuts and imported almonds, hazelnuts, pistachios, and walnuts as alternatives to macadamias.

Guatemala

Guatemala's macadamia production has potential to expand, since two thirds of Guatemala's trees are currently non-bearing. Production in 1996/97 is forecast at 2,272 tons, up 7 percent from the previous year.

Guatemala exports nearly all of its macadamia nut production. The United States is the largest purchaser.

(For further information on supply, distribution, and trade, contact William Janis at 202-720-0897. For further information on U.S. marketing opportunities, contact Stacey Peckins at 202-720-5330. For further information on production, contact Bernadine Baker at 202-720-0868.)

MACADAMIA NUTS: PRODUCTION, SUPPLY, AND DISTRIBUTION
(Metric Tons, In-shell Basis)
Marketing Years 1994/95-1996-97

Country/ Marketing Year	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks	Total Distribution
Australia [1]								
1994/95	0	18,000	0	18,000	12,609	5,391	0	18,000
1995/96	0	19,500	0	19,500	12,727	6,773	0	19,500
1996/97 [F]	0	23,000	0	23,000	15,000	8,000	0	23,000
Brazil [2] [3]								
1994/95	0	950	0	950	0	950	0	950
1995/96	0	1,050	0	1,050	122	828	0	950
1996/97 [F]	0	1,100	0	1,100	130	920	0	1,050
Costa Rica [4]								
1994/95	357	2,300	0	2,657	2,187	400	70	2,657
1995/96	70	2,300	0	2,370	2,035	265	70	2,370
1996/97 [F]	70	2,500	0	2,570	2,250	270	50	2,570
Guatemala [4]							240	
1994/95	120	2,130	150	2,400	2,265	15	120	2,400
1995/96	120	2,272	70	2,462	2,207	15	240	2,462
1996/97 [F]	120	2,400	100	2,620	2,485	15	120	2,620
Kenya [4]								
1994/95	500	4,100	0	4,600	3,714	286	600	4,600
1995/96	600	4,900	0	5,500	4,450	350	700	5,500
1996/97 [F]	700	5,400	0	6,100	5,080	370	650	6,100
South Africa [4]								
1994/95	0	2,455	0	2,455	2,122	333	0	2,455
1995/96	0	3,920	0	3,920	3,563	357	0	3,920
1996/97 [F]	0	4,780	0	4,780	4,400	380	0	4,780
United States [4] [5] [6]								
1994/95	0	23,810	12,370	36,180	5,009	31,171	0	36,180
1995/96	0	23,130	11,189	34,319	4,425	29,894	0	34,319
1996/97 [F]	0	24,950	10,500	35,450	5,000	30,450	0	35,450
TOTAL								
1994/95	977	53,745	12,520	67,242	27,906	38,546	790	67,242
1995/96	790	57,072	11,259	69,121	29,529	38,482	1,010	69,021
1996/97 [F]	890	64,130	10,600	75,620	34,345	40,405	820	75,570

[1] Marketing year begins on July 1 of first year shown.
[2] Exports are shelled.
[3] Domestic consumption derived from production and exports.
[4] Marketing year begins on January 1 of second year shown.
[5] U.S. exports and imports come from Bureau of the Census with forecasts by USDA/ Foreign Agricultural Service (FAS) with shelling ratios of .216 and .228 for 1994/95 and 1995/96, respectively. FAS used .228 for the 1996/97 shelling ratio.
[6] U.S. exports include only prepared and preserved macadamia nuts. The National Agricultural Statistics Service (NASS) in Hawaii indicates that few U.S. exports are shelled or in-shell.

U.S. EXPORTS OF PREPARED OR PRESERVED MACADAMIAS TO PRINCIPAL DESTINATIONS FOR CALENDAR YEARS

(Metric Tons, Kernel Weight Basis) 1/

Countries	1992	1993	1994	1995	1996
Japan	559	494	377	625	569
Hong Kong	119	127	62	111	181
Taiwan	28	49	36	61	73
Canada	56	39	36	121	54
Belgium	0	0	29	24	48
South Korea	92	34	21	63	37
Netherlands	12	12	7	3	17
Singapore	25	14	17	4	11
Switzerland	0	5	7	24	6
Philippines	17	3	1	4	5
All Other Countries	36	38	23	42	8
TOTAL	944	765	618	1,082	1,009

SOURCE: Bureau of the Census

1/ Shelling ratios for conversion of these quantities to in-shell equivalents originate from the National Agricultural Statistics Service in Hawaii. The ratios of the 5 years are as follows: 1992, 0.24; 1993, 0.215; 1994, 0.231; 1995, 0.216; and 1996, 0.228.

Outlook for Concentrated Apple Juice Production and Trade in Selected Countries

Production of concentrated apple juice (CAJ) in selected countries in 1996/97 is forecast at 660,000 tons (70/71 degrees brix), 8 percent above the previous season's output. Poland is expected to account for most of the increase in production. Production in the United States, the world's largest CAJ producer and consumer, is forecast to decrease 5 percent in 1996/97. Reduced apple crops in the eastern states combined with a good quality crop in western states have reduced U.S. supplies for processing apples in 1996/97. Selected country CAJ exports are forecast to increase 9 percent to 550,000 tons in 1996/97. Ample exportable supplies in Poland and Argentina, combined with lower international CAJ prices are expected to boost demand in major importing countries, such as the United States. U.S. CAJ imports in 1996/97 are forecast to increase 24 percent to 200,000 tons. U.S. CAJ exports are forecast at 10,500 tons in 1996/97.

Northern Hemisphere

U.S. CAJ production in 1996/97 is forecast to decrease for the second consecutive season; imports are likely to rise

U.S. CAJ production in 1996/97 is forecast at 148,000 tons, down 5 percent from the 1995/96 output. Reduced apple crops in the eastern states combined with high quality crops in the western states have reduced U.S. supplies for processing apples. Some processors in Michigan and the Appalachia region have had to buy processing apples from western states, pushing up processing prices in the East. A large proportion of U.S. apples produced in eastern states are for the processing sector, while apples from the West go mainly to the fresh domestic and export markets.

Although the United States is a huge producer of apples, U.S. CAJ processors must import CAJ in order to meet domestic demand. U.S. CAJ imports in 1996/97 are forecast at 200,000 tons, up 24 percent from last season. Reduced domestic supplies and lower international prices are expected to boost U.S. CAJ imports in 1996/97. Argentina, Germany, and Chile are the major suppliers of CAJ to the United States, accounting for about 70 percent of total U.S. imports.

U.S. CAJ exports are forecast at 10,500 tons in 1996/97, 8 percent below 1995/96 shipments. Major customers will likely continue to be Canada, Japan, Mexico, and Hong Kong. These countries accounted for about 85 percent of total U.S. CAJ exports in 1995/96.

Germany will continue to dominate world CAJ trade in 1996/97

Germany is the world's largest trader of concentrated apple juice (CAJ), accounting for about 45 percent of world imports and 25 percent of exports. German CAJ imports in 1996/97 are forecast at 220,000 tons, up 5 percent from 1995/96. Traditionally, the German apple juice industry depends heavily on imports of apple juice concentrates for further processing. Poland and Italy are by far the most important suppliers of CAJ to the German

processors and bottlers. Poland holds an import market share of around 25 percent and Italy about 15 percent. Other major suppliers to Germany are Turkey, Moldova, and the Czech Republic.

German CAJ exports in 1996/97 are forecast at 130,000 tons, 8 percent above shipments in 1995/96 based on likely higher shipments to the United States, which remains the largest single market for German CAJ exports. Exports to the United States in 1995/96 totaled 30,750 tons and some trade sources believe that shipments to the U.S. market can reach 40,000 tons in 1996/97. The United States imports almost exclusively sweet CAJ of above 1.33 density.

Germany is one of the largest consumers of CAJ, second only to the United States. The German juice industry expects further growth in the consumption of fruit juices and nectars in combination with a growth in consumption of all non-alcoholic drinks. Per capita consumption of alcoholic drinks (spirits, wine, beer) is declining.

A strong recovery is forecast for Polish CAJ production and exports in 1996/97

Poland's production and exports of CAJ are forecast to increase about 36 percent in 1996/97 because of a larger apple crop and stronger export demand. Most Polish CAJ production is exported (about 95 percent) to neighboring countries. Germany, Austria, and Russia are the leading customers, accounting for almost 90 percent of total Polish CAJ exports in 1995/96. Poland's exports of CAJ to the United States in 1995/96 dropped to 647 tons from 1,637 tons in 1994/95. Polish CAJ has high acidity (over 3 percent), while most U.S. importers prefer lower acidity levels between 2 and 2.5 percent.

Poland is the world's second largest CAJ producer (after the United States) and there is significant potential for further growth. Many growers are switching from apples for fresh consumption to varieties more suitable for processing. The Polish Center for Research and Development of Horticultural Production (COBRO) estimates that within the next five years, Polish apple production may increase to 2 million tons (1.5 million tons are forecast for 1996/97) and lead to a significant increase in CAJ output.

Southern Hemisphere

Argentina's CAJ production and exports are forecast at record levels in 1996/97

Argentine production of CAJ in 1996/97 is forecast at 75,000 tons, up 16 percent from 1995/96, due to a larger apple crop. Argentina, the leading CAJ producer in the Southern Hemisphere, processes the apples that cannot be sold to the fresh domestic or export markets. An estimated 79 percent of Argentina's processed apples go to CAJ, 16 percent for cider, and 5 percent is dried or processed into jams, vinegar, and other products. There are 16 apple processing plants, which operate year round. However, 80 percent of the processing is done during February-May and 20 percent during the rest of the year from cold-storage fruit.

Argentina is the third largest CAJ exporter for selected countries following Germany and Poland. Exports of CAJ in 1996/97 are forecast to increase to 72,500 tons as larger apple supplies and strong import demand from major customers have improved export prospects. The United States is Argentina's major CAJ market, accounting for more than 90 percent of total shipments. Recently, Japan ranks as the second main destination for Argentine CAJ.

Chile's CAJ exports in 1996/97 will continue strong

Increased apple production, higher world demand, and favorable international prices have boosted Chile's CAJ production and exports in recent years. Chile's CAJ exports in 1996/97 are forecast at 36,500 tons, practically unchanged from the record 1995/96 shipments. The United States is still Chile's largest CAJ export market (accounting for over 70 percent of total export sales), although it has lost importance to other markets such as Japan, Canada and Australia. New and growing markets are located in Latin America and Europe. However, the future level of Chile's CAJ exports will depend upon foreign demand and the ability of the industry to produce

at a lower cost. Only small amounts of CAJ are consumed domestically, principally of single-strength type.

There are nine CAJ processing plants in Chile. Traditionally, apples not suitable for the fresh export market are processed into apple juice. But as the processing market has become increasingly saturated with supplies from large apple crops, industry buyers have started to place increased attention on the quality of the product. As a result, the CAJ industry is both encouraging farmers to increase production of existing orchards of high acid apples as well as expanding new plantings. This expansion is mainly taking place in Region Ten (Osorno), far south of the traditional apple production areas. The industry wants additional high acid apples to blend with the Red Delicious varieties, of which there are abundant supplies in Chile's major production areas.

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CONCENTRATED APPLE JUICE: PRODUCTION, SUPPLY, AND UTILIZATION IN SELECTED COUNTRIES (METRIC TONS AT 70/71 DEGREES BRIX)

Country/ 1/ Mkting Year	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
NORTHERN HEMISPHERE COUNTRIES							
Austria							
1994/95	27,900	14,300	23,200	65,400	31,000	8,800	25,600
1995/96	25,600	11,500	20,000	57,100	33,000	8,200	15,900
1996/97 F	15,900	12,500	28,400	56,800	34,000	7,900	14,900
Bulgaria							
1994/95	10	1,031	212	1,253	300	943	10
1995/96	10	1,946	150	2,106	1,170	926	10
1996/97 F	10	1,200	130	1,340	900	430	10
France							
1994/95	0	13,000	4,600	17,600	4,800	12,800	0
1995/96	0	15,000	5,000	20,000	8,500	11,500	0
1996/97 F	0	15,000	5,000	20,000	8,500	11,500	0
Germany							
1994/95	164,056	74,571	202,721	441,348	109,803	150,259	181,286
1995/96	181,286	69,901	210,000	461,187	120,000	154,464	186,723
1996/97 F	186,723	75,000	220,000	481,723	130,000	165,000	186,723
Hungary							
1994/95	0	45,000	7,500	52,500	42,000	10,500	0
1995/96	0	40,000	6,100	46,100	36,000	10,100	0
1996/97 F	0	45,000	5,000	50,000	39,000	11,000	0
Italy							
1994/95	5,015	54,000	8,000	67,015	61,000	5,015	1,000
1995/96	1,000	45,000	14,000	60,000	55,000	5,000	0
1996/97 F	0	50,000	10,000	60,000	55,000	5,000	0
Mexico							
1994/95	0	9,550	1,000	10,550	7,000	3,550	0
1995/96	0	8,200	800	9,000	6,000	3,000	0
1996/97 F	0	7,500	1,000	8,500	5,000	3,500	0
Poland							
1994/95	0	108,000	0	108,000	105,320	2,680	0
1995/96	0	88,000	90	88,090	85,599	2,491	0
1996/97 F	0	120,000	0	120,000	115,000	5,000	0
Serbia and Montenegro							
1994/95	150	1,600	0	1,750	0	1,600	150
1995/96	150	1,600	0	1,750	0	1,600	150
1996/97 F	150	2,000	0	2,150	400	1,600	150
Slovakia							
1994/95	900	1,400	700	3,000	300	2,300	400
1995/96	400	1,900	700	3,000	400	2,300	300
1996/97 F	400	1,900	700	3,000	400	2,300	300
Spain							
1994/95	2,500	14,000	5,900	22,400	16,400	6,000	0
1995/96	0	15,600	4,800	20,400	14,950	5,450	0
1996/97 F	0	16,200	4,500	20,700	15,000	5,700	0

CONCENTRATED APPLE JUICE: PRODUCTION, SUPPLY, AND UTILIZATION IN SELECTED COUNTRIES (METRIC TONS AT 70/71 DEGREES BRIX)

Country/ Mkting Year	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
United States 2/							
1994/95	0	166,547	188,892	355,439	9,957	345,482	0
1995/96	0	156,150	161,599	317,749	11,413	306,336	0
1996/97 F	0	148,000	200,000	348,000	10,500	337,500	0
Subtotal							
1994/95	200,531	502,999	442,725	1,146,255	387,880	549,929	208,446
1995/96	208,446	454,797	423,239	1,086,482	372,032	511,367	203,083
1996/97 F	203,083	494,300	474,730	1,172,213	413,700	556,430	202,083
SOUTHERN HEMISPHERE COUNTRIES							
Argentina							
1994/95	135	65,350	400	65,885	62,700	2,800	385
1995/96	385	64,400	600	65,385	62,300	2,970	115
1996/97 F	115	75,000	300	75,415	72,500	2,800	115
Australia							
1994/95	0	14,000	1,358	15,358	949	14,409	0
1995/96	0	10,500	1,784	12,284	1,402	10,882	0
1996/97 F	0	15,400	1,000	16,400	1,500	14,900	0
Chile							
1994/95	540	31,400	0	31,940	30,940	500	500
1995/96	500	37,400	0	37,900	37,000	500	400
1996/97 F	400	37,300	0	37,700	36,500	500	700
New Zealand							
1994/95	0	10,700	1,100	11,800	9,500	2,300	0
1995/96	0	14,000	400	14,400	11,500	2,900	0
1996/97 F	0	15,000	400	15,400	12,500	2,900	0
South Africa, Republic of							
1994/95	0	20,355	1,548	21,903	12,437	9,466	0
1995/96	0	30,740	0	30,740	21,000	9,740	0
1996/97 F	0	22,975	0	22,975	13,000	9,975	0
Subtotal							
1994/95	675	141,805	4,406	146,886	116,526	29,475	885
1995/96	885	157,040	2,784	160,709	133,202	26,992	515
1996/97 F	515	165,675	1,700	167,890	136,000	31,075	815
TOTAL WORLD							
1994/95	201,206	644,804	447,131	1,293,141	504,406	579,404	209,331
1995/96	209,331	611,837	426,023	1,247,191	505,234	538,359	203,598
1996/97 F	203,598	659,975	476,430	1,340,103	549,700	587,505	202,898

1/ Northern Hemisphere marketing years are July-June for all countries except Italy where the marketing year is first year of split year. Southern Hemisphere marketing year is second year of split year except New Zealand where marketing year is October-September.
2/ U.S. stock figures not available. U.S. CAJ production estimated using fresh apple production data and proportion of fresh crop that is juiced (concentrate and single-strength). U.S. exports and imports from U.S. Dept. of Commerce, with 1996/97 forecast based on trends to date (through January 31, 1997).

Source: U.S. trade data from U.S. Dept. of Commerce, Bureau of Census; USDA Attache reports and USDA/FAS estimates.
U.S. apple production and juice proportions from "Non-Citrus and Nuts, 1996 Preliminary Summary" (January 1997, USDA/NASS)

U.S. Concentrated Apple Juice Exports
Marketing Years 1991/92-1995/96 1/
(Metric tons, 70/71 Degrees Brix)

Region/Country	1991/92	1992/93	1993/94	1994/95	1995/96
North America					
Canada	3,171	3,106	2,322	3,062	4,946
Mexico	199	223	428	198	302
Subtotal	3,370	3,329	2,751	3,261	5,248
Caribbean					
Dominican Republic	45	102	132	151	125
The Bahamas	176	51	96	48	66
Other	323	293	144	165	278
Subtotal	545	446	372	363	468
Central America					
Panama	223	168	119	137	79
Other	224	585	130	72	70
Subtotal	447	753	250	208	149
South America					
Venezuela	42	24	116	86	120
Other	78	227	52	12	26
Subtotal	120	251	167	99	146
European Union					
United Kingdom	8	17	219	144	36
Belgium	1	1	1	0	34
Other	25	89	115	50	41
Subtotal	34	108	335	194	111
Former Soviet Union					
Russia	0	15	93	72	69
Other	8	0	0	0	0
Subtotal	8	15	93	72	69
Middle East					
Saudi Arabia	65	69	48	52	41
Israel	12	0	2	11	24
United Arab Emirates	13	32	23	17	21
Other	25	29	15	23	6
Subtotal	116	130	88	103	92
Asia					
Japan	6,801	4,630	2,330	3,823	4,108
Hong Kong	286	299	392	470	302
Taiwan	156	223	192	275	202
Korea, Republic of	9	941	375	522	126
Other	510	399	565	481	296
Subtotal	7,762	6,492	3,854	5,570	5,034
Other Regions	154	55	87	87	95
World Total	12,555	11,578	7,997	9,957	11,413

1/ Source: U.S. Census of the Bureau; Marketing Year July-June.

U.S. Concentrated Apple Juice Imports
Marketing Years 1991/92-1995/96 1/
(Metric tons, 70/71 Degrees Brix)

Region/Country	1991/92	1992/93	1993/94	1994/95	1995/96
North America					
Canada	2,148	1,526	1,082	1,702	3,662
Mexico	6,193	5,612	4,716	6,931	3,458
Subtotal	8,341	7,138	5,798	8,632	7,120
South America					
Argentina	54,449	37,359	63,495	64,809	60,540
Chile	15,718	19,930	30,728	10,682	16,653
Brazil	2,576	3,059	5,937	3,094	6,370
Other	4	0	1	272	3
Subtotal	72,748	60,348	100,161	78,856	83,565
European Union					
Germany	28,282	36,004	39,869	41,203	30,750
Netherlands	2,433	3,694	8,359	9,897	6,744
Austria	7,053	6,903	6,404	2,929	1,747
Italy	121	5	75	0	1,446
Other	8,874	4,447	3,437	1,557	1,572
Subtotal	46,762	51,054	58,143	55,586	42,259
Eastern Europe					
Hungary	12,989	10,237	21,622	21,098	8,108
Poland	2,696	1,660	1,222	1,637	647
Other	2,740	146	201	315	172
Subtotal	18,424	12,043	23,045	23,051	8,927
Middle East					
Turkey	8,277	5,531	7,082	8,545	5,687
Israel	3	0	2	4	12
Other	0	0	0	58	3
Subtotal	8,280	5,531	7,084	8,607	5,702
Africa					
South Africa	549	3,647	6,417	3,165	6,244
Other	0	0	17	0	0
Subtotal	549	3,647	6,434	3,165	6,244
Other Regions	6,023	10,534	7,883	10,995	7,781
Total World	161,127	150,295	208,548	188,892	161,599

1/ Source: U.S. Census of the Bureau; Marketing Year July-June.

Despite Increasing Wine Production World Supply Remains Low

From 1982-1992, the European Union (EU) produced an average of 30 million hectoliters of excess wine. In order to help support EU wine producers in the face of high carryover stocks, the EU implemented an array of programs to help lower wine production. As a result of these programs coupled with unfavorable weather in a number of countries, such as Spain, wine supplies are sharply lower than 10 years ago although total wine production was up in 1996. France regained its position as the world's largest wine producer followed by Italy and Spain. French wine exports increased 10 percent in value, $2 billion during the first six months of 1996, compared to the same period in 1995. Although Italian wine exports rose in 1995, the upward trend is stalled in 1996, due mainly to higher production in other EU wine producing countries. U.S. exports of wine and wine products (including grape wine, must, cider, and other fermented beverages) reached $320 million in calendar year 1996, 36 percent above 1995. This was the U.S. wine industry's 12th consecutive record-breaking year. U.S. wine exports showed broad growth in both value and volume gains in Germany, United Kingdom, and Canada--all markets targeted under the Market Access Program. U.S. wine exports reached 1.8 million hectoliters in 1996 and are forecast to reach 2.2 million hectoliters in 1997. Robust foreign demand, more varieties of higher quality wine and market promotion efforts should continue to boost U.S. wine exports.

The European Union remains the major producer and consumer of wine in the world. EU wine production in France, Italy, Spain and Germany increased 13 percent to 157.5 million hectoliters in 1996. The EU exports approximately 10 million hectoliters of wine to third countries and imports about 3 million per year. The EU provides massive support to its wine industry in the form of an array of subsidies such as purchase of excess production, direct export refunds, aid for the use of must and acreage reduction which totaled $1.2 billion in 1996. EU wine assistance does not include the substantial marketing assistance provided by individual member states. However as a result of the Uruguay Round Agreement concluded on December 15, 1993, and implemented on July 1, 1995, the EU must reduce the volume of subsidized wine exports by 21 percent, and the value of wine production subsidies by 36 percent over a 6 year period starting September 1, 1995. In addition, the EU has agreed to decrease its import duties by 20 percent, delete the reference price, and eliminate import quotas.

FRANCE

France is expected to regain its postion as the world's largest wine producer in 1996. French wine production in 1996 is estimated at 59 million hectoliters, up 5 percent from 1995. Output in 1996 is broken out as follows: 24.5 million hectoliters for Quality Wines Produced in Determined Regions (VQPRD), 23.4 million hectoliters for table wines and 11.1 million hectoliters is for wines for cognac production. The production of VQPRD wines remained stable, but production of table wines and wines for cognac increased. However, production of champagne is forecast at about 2 million

hectoliters, a decrease of six percent compared to 1995.

EU continues to subsidize over a quarter of French wine exports in addition to French market assistance

The EU continues to provide export subsidies for French table wines and liquor wines without appellation, as well as concentrated grape must. Export subsidies were granted for French wines with destinations of Japan, Norway, Poland, Africa, and a few other countries. In marketing year 1994/95 (September to August), French wines exported with EU export subsidies totaled 354,018 hectoliters, representing 27 percent of total French table wine exports to non-EU countries. The largest volume of subsidized wine exports were destined for Japan, the United States' third largest export market. Approximately 150,000 hectoliters of subsidized French wine were shipped to Japan during 1994/95.

In addition to export refunds, the EU allocated $240 million in 1995 to the French wine sector for restructuring vineyards. The French Government also granted national subsidies to the wine sector in France through ONIVINS. In 1995, out of ONIVINS total budget of $107.7 million, $12.9 million was allocated to wine growers for restructuring and renovating vineyards by planting new vines and grubbing old vines. Another $3 million went to improving the production and processing structures, and $1.4 million was allocated for research and experimentation. In addition, in ONIVINS budgeted $8.7 million for the financing of promotional campaigns conducted by the French National Market Promotion Agency (SOPEXA) for French wines in international markets. This budget was 30 percent above 1994, and focused on advertising campaigns, promotional materials, and in-store promotions in specialized outlets, hotels, restaurants, as well as fairs and trade shows.

The EU continues to provide massive support to the wine industry in France and other member states. The United States continues to face stiff competition from the EU as it tries to increase its foothold in international markets. In comparison, the U.S. wine industry received a little over $4 million under the Market Access Program for worldwide export promotion activities.

France continues to show a wine trade surplus

France's 1995 trade balance for wines, vermouths and spirits showed a trade surplus of $5.6 million.

The United Kingdom, Germany, Belgium /Luxembourg, and the United States were the leading French export markets. In 1995, French wine exports increased 2 percent in volume and 5 percent in value, to 12 million hectoliters valued at $4.6 billion.

France's wine market share decreased significantly in 1995 in Denmark, the Netherlands, and the United Kingdom. As a result, the United States was able to increase its market share in all three markets. This decrease was due to the boycott of French products by certain consumers of Denmark and The Netherlands because of French nuclear tests in the South Pacific during November and December 1995. France also lost market share in the United Kingdom because of increased consumption of new world wines. Conversely, France reinforced its market in Belgium and Germany where French wines have a leading position and compete with Italian wines. French wine exports increased another 10 percent in value, $2 billion during the first six months of 1996, compared to the same period in 1995, while exports of vermouths decreased 11 percent.

Total French wine imports accounted for $0.5 billion in 1995. For the first time in 15 years, occasional consumers increased their wine consumption, while consumption by regular wine consumers decreased. During 1995, Italy was France's leading wine supplier, followed by Spain and Portugal.

ITALY

Italy lost its position as the world's largest wine producer as it slipped to second place behind France in 1996. Nevertheless, Italian wine production in 1996 is estimated at 58.4 million hectoliters, up 5 percent from 1995.

Italy continues to reduce area planted to grapes for wine production which contributes to substantial reduction in distillation programs

Italy continues to reduce the area planted to grapes for wine production. In 1995, total wine grape area declined to about 850,000 hectares, down three percent from 1994. During 1980-1995, approximately 365,000 hectares have been shifted to other crops or abandoned. The European Union's (EU) recent policy of granting a special premium to producers who uproot all or a portion of their vineyard, further stimulated the decline in planted area. From 1988/89 (when the program was first introduced) to 1995/96 about 138,000 hectares have been uprooted in Italy, mainly in the southern regions where most of the production is classified as table wine.

Decreased Italian wine production contributed to a substantial reduction in the distillation programs, which support growers' incomes. In 1995/96 distillation is estimated at about 2.2 million hectoliters, the lowest level in recent years. The general expectation for 1996/97 is for an almost negligible compulsory distillation. In 1996/97 "preventive" distillation may cover larger volumes than last year because of increased domestic production and declining prices; however, the quantity will be negligible compared to the high levels of the recent past.

The proposed revision of the Common Agricultural Policy (CAP) for the wine sector has not been approved by the Agricultural Council of Ministers. The CAP reform is targeted mainly at reducing surpluses through cuts in production and member state national quotas. However, the low output obtained in the major EU producing countries during the past few years has made some of the issues less topical. Lower expenditures on the distillation programs has also eased the pressure for reform.

Quality wines represent small proportion of wines; however, overall producer prices are up

The Italian wine industry offers an array of products based on four quality levels: Guaranteed Appellation of Origin (DOCG), Appellation of Origin (DOC), table wine of geographic indication, and ordinary table wine. DOC wines come from carefully delineated areas, have specific quality characteristics, and are subject to European Union (EU) regulations. Currently, there are 270 DOC wines in Italy and 16 DOCG wines up from 241 DOC and 14 DOCG wines in 1995. The new entries into the national lists were represented mainly by DOC wines, although two DOCG wines were added as well (Spumante Brachetto d'Acqui and Vermentino di Gallura). Many of the most valuable Italian wines are DOCG (i.e. Asti Spumante, Barolo, Barbaresco, Chianti, Brunello di Montalcino).

Despite the new entries into the national list, DOC wine production does not exceed 15 to 16 percent of total Italian wine production. This share varies considerably among the different producing regions, with the highest levels in Trentino Alto Adige (67 percent), Friuli Venezia Giulia (53 percent), Tuscany (46 percent) and Lombardy (45 percent), and minimum levels in the South where most of the production is classified as table wine.

Even though quality wines (DOC and DOCG) represent a small share of total Italian wine production, producer prices remain higher than the average of the previous years. After a prolonged depressed market, domestic wine prices began recovering in 1994 and increased significantly in 1995. In response to reduced EU production, prices were high during the first months of 1996.

In the last few months of 1996, domestic wine prices gradually declined due to the prospect of a relatively large crop both in Italy and in the rest of the EU, as well as reduced export demand. Producer prices in 1996 were about 20 to 25 percent lower than the record levels in 1995.

However, producer prices in 1996 were higher than the average of the previous 5 years.

High wine prices negatively affect domestic consumption; imports remain marginal

Higher producer prices have translated into higher retail prices for wine. As a result, many consumers are beginning to substitute alcoholic and non-alcoholic beverages, like beer and soft drinks for wine. Per capita domestic wine consumption is now about 60 liters compared with 110 liters in 1970.

High domestic prices in 1995 attracted imports of relatively cheap wine from non-traditional sources, such as Argentina and Bulgaria. Shipments from the United States remained minimal, increasing 2 percent from 2,850 hectoliters in 1995 to 2,910 hectoliters in 1996.

Total wine imports were down by 14 percent, to 214,744 hectoliters in 1995. Imports recovered only partially in the first half of 1996, due mainly to the reduced domestic crop. Wine imports into Italy usually are products (e.g. Champagne, Port and Sherry) from other EU countries. Trade sources note that a targeted promotional campaign could help long term prospects for U.S. wine exports to Italy.

Italian exports stall as EU production returns to normal levels in 1996

Although Italian wine exports rose in 1995 the upward trend is expected to stall in 1996, due mainly to production in other EU wine producing countries returning to normal levels. Italian wine exports rose in 1995 to 17.1 million hectoliters, or 3 percent above 1994, mainly due to reduced output in other European wine producing countries and the depreciation of the lira. This was the largest export volume since 1982, when Italian exports were a record of 19.4 million hectoliters.

Italian exports of DOC wines in 1995 (up 16 percent from 1994) represented 22 percent of total wine shipments and 41 percent of total value. Table wines accounted for the largest share in volume (62 percent) with the value share much smaller (36 percent). Exports of Spumanti wines in 1995, on the other hand, accounted for only 10 percent of the value, due to a sharp reduction of the shipments of cheap Spumanti and sparkling wines to Russia.

In 1995, Germany was the top market for Italian wines, accounting for approximately 33 percent of total Italian export volume and value. France was second in volume terms, followed by Spain, the United States and the United Kingdom. In value terms, the United States was the second largest market for Italian wines, accounting for about 15 percent of exports. Exports to France are mainly bulk table wines (98 percent of total), while about half of Italian shipments to the United States are represented by DOC wines and almost 80 percent by bottled wines.

The upward trend in Italian wine exports likely stalled in 1996, based on partial year data showing strong declines in shipments to other EU countries. France, Spain and Portugal imported less wine from Italy because of a recovery in domestic production.

The Italian Trade Commission (ICE), an Agency of the Ministry of Foreign Trade, remains the main institution providing export promotion assistance for wine. ICE focuses its efforts on five major markets (Germany, the United Kingdom, United States, Canada and Japan). In the past, both the Ministry of Agriculture and the Ministry of Foreign Trade allocated $13 million to ICE for two years to promote Italian wine through such activities as advertising, wine tastings and public relations including trade missions to Italy. However, a new allocation from the Ministry of Agriculture to ICE seems unlikely because of new legislation giving promotion assistance authority to the 20 Italian wine regions. The Ministry of Foreign Trade independently allocates slightly less than $1 million, channeled through ICE for trade show participation.

SPAIN

Spanish vineyard acreage is the largest in the world, accounting for approximately 17 percent

of global vineyard area. However, Spain ranks only third in wine production behind France and Italy because of low yields on unirrigated vineyards. In addition, a drought in recent years brought yields below normal levels. Although the drought is over, 1996 production is forecast below average because of drought damage to the vines, poor soils in certain areas, less acreage as a result of the EU vineyard uprooting program, and a government ban on vineyard irrigation. Heavy sustained rains, prevalent throughout most of Peninsular Spain since December 1996, have set the stage for a potentially very productive year in Spain's agricultural sector. Expected wine output, assuming average rainfall in April/May 1997, will be 32 million hectoliters, slightly above the 1996 forecast. Moreover, the government has recently modified its irrigation policy to allow irrigation of table wines.

The 1996 vintage is expected to comprise about 11 million hectoliters of quality wines and 18.6 million hectoliters of ordinary table wines. Spain has diverse soils and climates which allow ample production of a range of wine types; there are currently more than 30 different wine appellations in Spain.

The Castilla-La Mancha Region remains the largest wine producing area in Spain

Wine grape production occurs in over 10 regions in Spain. In terms of volume, the Castilla-LaMancha Region accounted for 48 percent of total wine production in 1996, up 105 percent to 15.1 million hectoliters. However, most of the vineyard uprooting is taking place in Castilla-La Mancha. This uprooting program has significantly reduced area in the last decade.

The EU continues to support the Spanish wine sector through distillation intervention, storage aids, and vineyard restructuring support. Surplus Spanish wine is sold into intervention where it is subsequently distilled into alcohol. Wine alcohol is partially used in making sherry, other fortified wines and spirits, brandy in particular, and the remainder is exported. Intervention distillation in Spain amounted to about 0.80 million hectoliters in MY 1995/96. In 1996/97, the EU approved 3.2 million liters to be distilled as part of the preventive distillation program. Under this program, Spain is allowed to distill up to 18 percent of its table wine output.

EU Upgrading Program

The EU 458/80 vineyard upgrading program supports replanting operations by groups of farmers to improve the quality of their wines. This 10 year-program is scheduled to end in 1997 and will finance the upgrading of about 32,600 hectares of vineyards in Spain. This program has contributed to the recent proliferation of non-native wine varieties such as Cabernets, Chardonnays, Pinot Noir, and Merlot, especially in non-quality wine areas.

Spain opposed to reform of EU wine regime

The EU reform of the wine regime continues to be stalled since the EU Commission presented its proposal in June 1994. Dissension and strong opposition from some member states, including Spain, are behind the lack of progress. The Government of Spain is especially opposed to the proposed reduction in Spain's production quota, which the EU planned to establish 20 percent below average output (36 million hectoliters). This would be the largest reduction in the EU and would mean than an additional 280,000 to 380,000 hectares of Spanish vineyards would need to be uprooted. The Spanish wine industry is also opposed to allowing northern European countries to practice chaptalization, or adding sugar to wine during the fermentation process to increase the alcohol content. The Northern European countries use chaptalization because the sugar content of northern grape varieties is so low. However, chaptalization is banned in Spain, where only grape must or concentrated juice can be used to enhance the alcohol content of wines. Spain would like to extend this ban to the entire EU. Trade sources indicate that if fermentation additives were restricted solely to grape must or concentrated juice as is currently the case in Spain, an additional demand for some 20 million hectoliters of wine would be generated and EU wine surpluses would be virtually eliminated.

Wine consumption continues downward

Wine consumption continued to decline in 1995 to 30.4 liters per capita, 2.26 liters less than in 1994. This compares with 70 liters in the early 1970s. Reduced supplies and higher prices contributed to the consumption decline in 1995. The consumption decline for quality wines marked a reversal of the upward trend observed since 1988.

Spanish wine exports up in value but down in volume

In terms of volume, Spanish wine exports for 1995 declined 20 percent to 6.65 million hectoliters, in terms of value they rose 10 percent to about $1 billion. The rest of the EU continues to be the predominant destination for all types of Spanish wine, followed by the United States and Canada for quality wines, and certain African markets for table wines. Spain was the fourth largest supplier of wine to the United States, up 3 percent in 1996 from 179,370 hectoliters in 1995. In terms of value, U.S. imports from Spain were up 9 percent from 1995 to $76.7 million.

Wine imports increased 366 percent

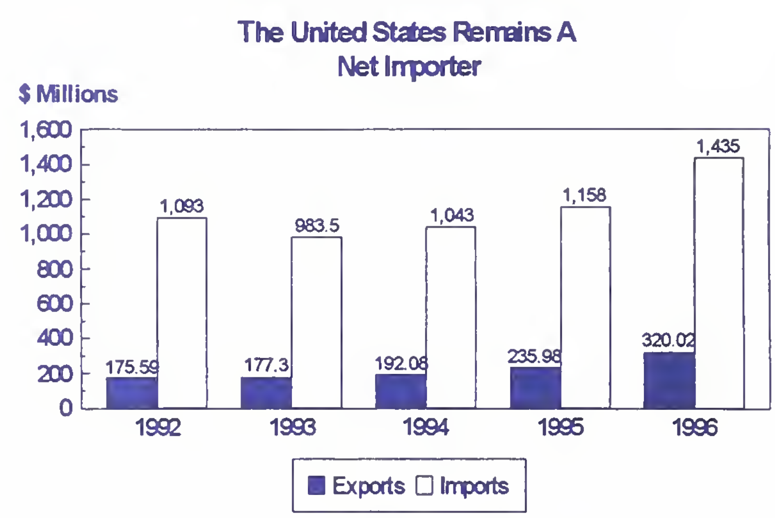
Spanish wine imports increased 366 percent to 2.59 million hectoliters in 1995. Other EU countries were the major suppliers of wine to Spain. Imports from other EU countries were up 178 percent in 1995. Imports from the United States also increased to 1,323 hectoliters in 1995. Spain's wine imports are basically limited to a speciality market. Some high priced U.S. brands already have in-country distribution, and there are also some marketing opportunities for medium priced wines.

UNITED STATES

The U.S. wine industry has experienced several years of below-average U.S. grape production in the 1990s. The wine production, supply and distribution table on page 40 highlights U.S. wine industry activity. A resurgence of U.S. demand and continued strong exports have reduced inventories held by U.S. wineries. The United States remains a net importer of wine. U.S. wine imports are likely to continue to increase in 1997, following a 24 percent value increase from $1.2 billion to $1.4 billion. The United States imports twice as much wine as it exports, but imported wines tend to be higher priced than exported wine. The ratio of imports to exports has decreased from 6 to 1 down to 4 to 1 over the period of 1992 to 1996. The graph below highlights U.S. exports and imports.

U.S. Wine Exports Reach Record $320 Million

U.S. wine exports have made impressive gains over the last 5 years, exports were up 82 percent, from $175 million in 1992 to a little over $320 million in 1996. U.S. wine exporters compete mainly with foreign domestic producers and French, Italian, Spanish exporters. U.S.



exports of wine and wine products reached $320 million during calendar year 1996, their 12th consecutive record-breaking year, and a 36 percent gain over the preceding year. Grape wine represented most of the $320 million of wine and wine products exports, except $18 million, consisting of fermented beverages and cider. U.S. wine exports also reached a record 1.8 million hectoliters, 23 percent above 1995. U.S. wines registered impressive value gains in Germany (up 275 percent); the United Kingdom (up 37 percent); and Canada (up 34 percent) -- all markets targeted under the Market Access Program. More varieties of higher quality U.S.

wine, robust foreign demand, favorable exchange rates, and market promotion efforts combined to boost U.S. wine and wine products exports.

United Kingdom is top U.S. wine export market

U.S. wine exports to the United Kingdom reached $79.7 million in 1996, up 37 percent from 1995. In terms of volume exports increased 16 percent to 376,860 hectoliters in 1996. The Market Access Program and U.S. exporter assistance were instrumental in this increase.

Traditionally, the United Kingdom has favored European wines, but in the last decade this has been eroded by a surge of good quality wines from the rest of the world. While excitement has been created by "New World" newcomers, the market is still dominated by French wines. Although the EU share of wine exports is diminishing, French wine still has a substantial market share in the United Kingdom, approximately 33 percent in 1995. The second largest supplier is Germany followed by Italy and Spain.

Third country U.K. imports are rising steadily. The U.K. consumer is becoming increasingly discerning and expects quality at a very reasonable price. Despite the duty placed on wine from third countries, U.S. wine is still competitive with wine from the EU. In order to continue to move product, the United States needs to supply a good quality wine within the $5.60 to $8.40 range. The greatest competition to U.S. wines comes from Chile as it is becoming renowned for quality wine at a reasonable cost. Chilean wines are now selling at $5.50, $5.90 and $7.20 price points which means that they are moving into the U.S. price bracket.

White wines are the most popular in the United Kingdom, particularly with women. As white wine is generally lighter and cheaper, it is favored by new consumers entering the market, while red wine tends to be more of an acquired taste and associated with an older age group. U.K. consumers are becoming increasingly knowledgeable about grape varieties. Consumers who have tried the well-established grape varieties of, for example, Cabernet Sauvignon, and Merlot are looking for new tastes, and are open to trying new varieties. Buyers have noted that Zinfandel is still relatively unknown to the U.K. mass market and could present an opportunity for promotion.

U.S. wine exports to Canada were up 34 percent in value, but not enough for Canada to regain its title as the largest U.S. wine market

U.S. wine exports to Canada increased from $53.5 million in 1995 to $71.5 million in 1996. U.S. sales of wine expanded in both value and volume. A moderate strengthening of the economy and of consumer confidence since the recession in the early 1990s has been the primary reason for the firming of the wine market. Sales data reveal a shift in consumer preferences to red wines, although sales of white wines were still about double those of red in 1994/95.

The profile of Canadian wine imports from the United States has shifted in the past several years toward increased shipments of higher-priced wine in containers of two liters or less and reduced shipment of bulk wines. U.S. wine exports to Canada have benefitted from a series of very good quality California vintages. The United States was able to supply wine during the time French and Italian wine producing regions were experiencing difficulties.

On average, the average unit value of imports from the United States has increased in recent years. For example, U.S. wine exports reported a volume gain of 22 percent in 1996 compared to a 34 percent gain in value. However, U.S. exporters should be aware that despite the improvement in the economy, price and perceived value remain key factors for maintaining sales volume in Canada. Provincial liquor boards are very conscious of key price points, and U.S. suppliers should expect them to be very tough in negotiations on price.

U.S. wine exports were down to Japan, the third largest export market

U.S. wine exports to Japan were down 4 percent from $32.1 million in 1995 to $30.9 million in 1996. In terms of volume, exports were down by 1 percent to 191,950 hectoliters in 1996. The Japanese market, which posted robust gains in the late 1980's, suffered a serious contraction between 1990 and 1993 due to the prolonged Japanese recession. The economic downturn in Japan affected the restaurant business, particularly high-end restaurants that tend to be outlets for high-priced, imported wine. Wine, with its upscale image and association with special occasions, rather than everyday consumption, suffered during the recession.

Japan is slowly recovering from the recession. Wine is "in" again, and consumers are more and more consuming wine, especially red wine, when dining out. Thus, the overall view of Japanese wine consumption over the past ten years is encouraging.

U.S. wines face stiff competition from French wines. French wines dominate the market for imported wine in Japan and have long held a clear volume lead in both still and sparkling wines. The unit value of French wines has dropped sharply since 1993, however, the Japanese market has moved to lower-priced wines. The main advantage French wine enjoys is a strong image among traders and consumers as the "best wine in the world." Generally, the Japanese public continues to be unaware of or misinformed about quality U.S. wines. Through various activities funded under the Market Access Program, U.S. wines exports to Japan should fair better in 1997.

U.S. wine exports to Germany posted the largest gain during 1996

Germany emerged as the fourth largest export market for U.S. wine exports. U.S. wine exports to Germany reported the greatest gain during 1996 in both value and volume terms. Value of U.S. wine exports to Germany increased 275 percent in 1996, up from $5.4 million in 1995 to $20.3 million. In terms of volume, exports were up 229 percent to 103,140 hectoliters.

Germany is the world's largest importer of wine, with imports totaling 10.5 million hectoliters in 1995, valued at $1.7 billion. Even though U.S. wine exports to Germany quadrupled in value to just over $20 million, the United States maintains a market share of approximately 1 percent. Italy, France, and Spain are the leading suppliers of wine to Germany, with a combined market share of 82 percent. Other important suppliers include Cyprus, Macedonia and Greece.

Germany remains an important market for growth in U.S. wine exports. Almost two-thirds of German wine consumption is provided by foreign wine. U.S. wine has developed an increasingly good reputation for quality in the German market, but faces stiff competition from domestically produced and other imported products. However as a result of the Uruguay Round Agreement, U.S. wine exports to Germany should continue to grow as the EU reduces its wine import tariff by an average of 20 percent by July 1, 2000. U.S. wine has been successful in penetrating the German restaurant and speciality wine shop market, which typically features higher-price wine, and less so in supplying the lower-price supermarket segment. However, the lower price (up to $2 per bottle) segment of the German wine market is losing market share, while the middle and higher-price segments have increased. The most important market is the $2 to $5 segment, as 57 percent of all wine sales fall within this category; U.S. wine exports should continue to increase if the U.S. industry is able to market more wine in the $2 to $5 range. Also German trade sources report a growing market niche for organic wine in Germany.

New Markets

The export base for U.S. wine and wine products is also expanding. Notable new markets are emerging in Denmark, Ireland, the Netherlands, Sweden, Switzerland, Hong Kong, South Korea, and Thailand. Growth in U.S. wine exports is expected to continue over the next few years. Worldwide wine supplies are lower than 10 years

ago and are not sufficient to meet demand. Wine production in the United States, France, Italy, Spain, Argentina, and Germany, representing over 70 percent of world total, was up 9 percent in 1996, compared to 1995 and 5 percent more than in 1994. However with the usual period of over a year before significant amounts of 1996 vintage are available, the growth in U.S. wine exports is expected to continue. U.S. wine exports are forecast to reach 2.2 million hectoliters in 1997, up 13 percent from 1996 as more varieties of higher quality U.S. wine, robust foreign demand and market promotion efforts continue to boost exports.

For further information on supply, distribution and trade, contact Yvette Wedderburn Bomersheim at 202-720-9903. For information on marketing opportunities contact Ted Goldammer on 202-720-8498.

U.S. WINE: PRODUCTION, SUPPLY & DISTRIBUTION

Calendar year	Supply 1/ Inventory	Imports	Production	Total	Exports	Domestic consumption 2/ Total	Per capita
	--Thousand hectoliters--						Liters
1989	22,936	2,886	18,291	44,113	854	19,595	7.9
1990	22,755	2,552	18,445	43,752	1,028	19,338	7.7
1991	22,502	2,335	17,218	42,054	1,201	17,342	6.9
1992	22,596	2,706	15,219	40,520	1,427	16,322	6.4
1993	21,811	2,480	19,441	43,733	1,303	19,293	7.5
1994	22,292	2,746	17,550	42,589	1,307	19,072	7.3
1995	21,365	2,811	18,668	42,844	1,435	21,765	8.3
1996 P	19,086	3,593	18,877	41,556	1,759	20,463	7.7
1997 F	19,034	4,500	19,000	42,534	2,200	20,800	7.8

Sources: U.S. Department of Treasury, Bureau of Alcohol, Tobacco, and Firearms (production, inventory), U.S. Department of Agriculture, Foreign Agricultural Service (trade).

P = USDA preliminary estimates. P=USDA forecasts.

1/ December 31 stocks held by wineries; includes bulk and bottled still and effervescent wines.

Trade definition includes cider, must, and "other fermented beverages".

BATF bulk production of still wine with increases after fermentation and effervescent bulk and bottled.

2/ Excludes production for vinegar, non-beverage wine, and use as distilling material.

U.S. WINE EXPORTS
1992-1996 1/
(HECTOLITERS)

DESTINATION	1992	1993	1994	1995	1996
SELECTED COUNTRIES					
United Kingdom	234,680	244,160	200,310	325,600	376,860
Canada	370,220	338,560	346,430	293,410	359,020
Japan	228,670	138,490	173,790	193,500	191,950
Germany	43,970	55,530	23,040	31,340	103,140
Switzerland	34,070	30,900	52,110	82,510	85,930
Netherlands	22,710	30,600	29,250	49,760	60,600
Sweden	37,060	21,020	69,510	35,140	54,520
Denmark	42,220	65,660	33,770	37,580	53,160
Taiwan	21,510	37,470	33,260	29,320	35,080
Mexico	111,260	61,760	57,910	27,390	33,270
All Others	280,910	279,010	287,790	329,660	405,470
Total Volume	1,427,280	1,303,160	1,307,170	1,435,210	1,759,000

1/ Calendar year data.
Source: U.S. Census data.

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
JAN 1997

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT											
FR. APPLES(JUL)	MT										
TAIWAN		14,321	15,463	76,080	91,020	101,650	11,398	11,058	54,859	60,823	72,448
MEXICO		8,197	9,608	28,046	29,869	80,802	4,612	4,606	14,987	14,802	41,697
CANADA		6,873	8,080	47,511	52,129	78,790	5,937	6,291	37,045	39,964	62,246
HONG KONG		6,936	6,462	31,703	27,701	49,741	4,560	3,884	20,197	17,210	31,788
INDONESIA		4,786	5,861	27,448	27,162	49,455	3,134	4,092	18,158	19,675	33,534
EU-15		3,430	3,094	20,453	21,376	35,480	2,289	1,797	11,832	12,131	21,366
OTHER		14,526	21,938	126,408	147,921	166,636	9,861	14,043	76,855	87,708	104,109
Subtotal:-----		59,070	70,506	357,648	397,178	562,555	41,793	45,770	233,932	252,313	367,188
FR. PEARS(JUL)	MT										
CANADA		3,643	3,044	32,880	31,597	44,348	2,428	2,637	22,540	25,324	31,557
MEXICO		3,165	2,835	14,111	18,670	28,430	1,725	1,338	7,475	9,244	14,384
BRAZIL		42	117	21,728	17,895	21,747	27	70	9,512	7,972	9,522
EU-15		809	1,275	10,597	6,873	11,582	370	603	4,464	3,280	5,090
TAIWAN		1,955	446	8,471	3,891	11,438	1,140	290	4,784	2,654	6,655
OTHER		2,817	2,432	17,879	15,084	25,768	1,541	2,288	9,911	10,729	15,361
Subtotal:-----		12,433	10,150	105,666	94,010	143,313	7,231	7,226	58,687	59,204	82,570
APRICOTS(MAY)	MT										
CANADA		44	21	2,676	2,355	2,679	58	31	3,629	3,354	3,632
EU-15		14	0	402	216	431	11	0	765	238	796
MEXICO		0	0	324	182	324	0	0	289	145	289
HONG KONG		0	16	222	16	222	0	6	611	6	611
OTHER		42	0	556	297	596	37	0	753	290	773
Subtotal:-----		100	37	4,180	3,067	4,252	105	37	6,046	4,032	6,102
FR CHERRIES(MAY)	MT										
JAPAN		0	0	17,170	13,124	17,183	0	0	110,553	80,071	110,610
EU-15		682	332	8,068	7,699	9,184	617	256	12,039	15,851	12,823
CANADA		21	18	3,477	4,811	3,492	22	44	8,734	12,779	8,773
NETHERLANDS		254	91	2,961	2,573	3,233	204	68	2,504	2,536	2,712
BELGIUM-LUXEMBOU		192	242	2,537	1,503	2,826	238	188	2,602	1,333	2,804
TAIWAN		0	0	2,098	3,244	2,120	0	0	6,325	10,971	6,428
OTHER		1	1	1,691	2,450	1,714	6	18	4,294	7,877	4,364
Subtotal:-----		705	351	32,504	31,327	33,692	645	318	141,945	127,549	143,048
PEACH-NECTRN(MAY)	MT										
CANADA		276	346	39,614	41,524	40,277	416	493	41,584	41,173	42,457
MEXICO		0	0	11,674	8,782	11,693	0	0	5,159	4,498	5,164
TAIWAN		0	0	9,818	16,159	9,818	0	0	11,033	18,132	11,033
OTHER		22	19	4,507	8,475	4,746	17	35	3,832	7,954	3,958
Subtotal:-----		298	365	65,613	74,940	66,534	433	528	61,609	71,757	62,612
PLUM-PRUNES(MAY)	MT										
CANADA		142	166	13,854	21,841	14,364	231	271	19,941	19,546	20,733
TAIWAN		30	0	13,995	21,376	14,000	38	0	15,075	19,377	15,084
HONG KONG		5	0	5,459	12,027	5,459	12	0	6,119	10,838	6,119
OTHER		20	10	4,480	11,118	4,590	25	10	4,829	9,708	4,969
Subtotal:-----		198	176	37,789	66,361	38,413	305	281	45,964	59,469	46,905
FR AVOCADOS(OCT)	MT										
EU-15		538	379	2,883	2,087	5,984	292	467	1,828	1,766	4,918
NETHERLANDS		325	264	1,892	1,600	4,178	187	279	1,234	1,249	3,271
JAPAN		20	0	116	5	2,784	14	0	110	3	5,866
CANADA		101	112	588	514	1,183	85	110	569	503	1,272
UNITED KINGDOM		106	59	521	281	1,034	48	64	290	255	943
OTHER		7	9	20	69	139	17	16	37	104	286
Subtotal:-----		665	500	3,607	2,674	10,090	408	593	2,544	2,376	12,342
FR KIWIFRUIT(OCT)	MT										
CANADA		199	266	688	1,145	2,339	265	264	906	1,188	2,939
KOREA, REPUBLIC		474	580	812	1,066	1,572	682	1,074	1,223	1,846	2,640
TAIWAN		16	0	61	0	509	24	0	81	0	831
JAPAN		60	0	74	0	338	46	0	57	0	293
OTHER		151	120	252	209	557	231	161	348	346	676
Subtotal:-----		899	966	1,888	2,420	5,315	1,249	1,498	2,615	3,380	7,378
FRESH GRAPES (MAY)	MT										
CANADA		1,451	617	101,577	84,004	103,704	1,879	1,061	115,317	106,024	118,691
HONG KONG		2,149	288	30,181	36,633	30,319	2,780	293	40,566	55,407	40,706
TAIWAN		282	17	12,880	16,076	12,897	288	9	15,997	20,709	16,002
MEXICO		1,529	31	12,650	9,198	12,813	1,436	87	11,851	9,266	12,074
OTHER		3,330	513	66,388	58,604	67,159	3,752	460	89,585	89,046	90,470
Subtotal:-----		8,742	1,465	223,676	204,515	226,892	10,136	1,910	273,316	280,452	277,943
FR STRAWBRIS(JAN)	MT										
CANADA		1,254	1,137	1,254	1,137	40,277	2,616	2,328	2,616	2,328	52,087
JAPAN		0	0	0	0	6,227	3	0	3	0	24,792
EU-15		238	95	238	95	3,167	688	248	688	248	8,956
OTHER		48	63	48	63	2,960	151	165	151	165	4,252
Subtotal:-----		1,540	1,294	1,540	1,294	52,631	3,459	2,742	3,459	2,742	90,086
FR ORNG INC TMPL(NOV)	MT										
CANADA		25,114	25,665	57,177	58,611	176,012	11,674	12,912	28,792	29,603	88,806
JAPAN		7,551	12,342	19,500	20,258	124,446	4,854	6,863	13,947	12,509	84,819
HONG KONG		8,574	14,517	17,103	25,023	101,408	4,457	8,387	8,607	14,667	51,892
OTHER		7,977	9,252	17,467	22,733	106,529	4,649	5,506	9,944	13,479	59,290
Subtotal:-----		49,215	61,775	111,248	126,626	508,396	25,633	33,668	61,291	70,259	284,807
FR GRPFRT(SEP)	MT										
JAPAN		23,534	28,767	68,945	62,191	242,518	13,270	15,984	42,544	37,101	144,608
EU-15		25,815	24,173	79,441	67,799	140,157	10,944	10,096	35,579	29,210	62,116
CANADA		8,839	9,301	34,949	33,331	72,102	3,187	3,454	14,196	13,421	29,421
FRANCE		9,712	7,451	26,942	21,963	54,680	4,096	3,072	12,041	8,992	24,071
NETHERLANDS		7,640	7,514	29,693	22,036	47,857	3,245	3,090	13,212	9,797	21,251
OTHER		2,747	3,017	8,124	11,738	45,174	1,532	1,752	4,478	8,351	24,090
Subtotal:-----		60,936	65,258	191,460	175,059	499,950	28,933	31,285	96,798	88,083	260,234
FR TANGERINES(NOV)	MT										
CANADA		2,217	2,325	7,314	7,286	13,556	1,956	1,837	6,370	5,462	11,526
KOREA, REPUBLIC		0	0	1,232	432	1,232	0	0	1,565	382	1,565
JAPAN		66	265	66	289	1,191	70	314	70	337	1,129
OTHER		124	299	441	984	1,140	92	272	374	805	962
Subtotal:-----		2,406	2,889	9,052	8,990	17,118	2,118	2,423	8,380	6,987	15,182

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	QUANTITY CURR MO CURR YR	QUANTITY YR TOT LAST YR	QUANTITY YR TOT CURR YR	QUANTITY LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	VALUE CURR MO CURR YR	VALUE YR TOT LAST YR	VALUE YR TOT CURR YR	VALUE LAST YEAR
FRESH FRUIT											
CANNED FRUIT											
CND PEACH&NECT(JUN)	MT										
CANADA		499	267	3,558	2,462	5,589	499	291	3,182	2,813	5,285
JAPAN		317	104	2,881	1,334	4,290	326	129	3,044	1,402	4,530
KOREA, REPUBLIC		80	191	1,415	911	2,495	62	156	1,133	767	2,031
TAIWAN		210	140	1,410	914	1,852	192	115	1,245	805	1,649
OTHER		276	499	4,909	4,126	7,068	239	544	4,523	4,132	6,644
Subtotal:-----		1,383	1,201	14,173	9,747	21,293	1,318	1,236	13,126	9,919	20,139
CND PEARS(JUN)	MT										
CANADA		356	212	3,321	1,840	5,669	388	230	3,005	1,999	5,086
JAPAN		39	37	418	278	623	43	41	416	272	589
OTHER		185	27	641	472	1,023	196	34	616	427	995
Subtotal:-----		579	276	4,379	2,590	7,315	627	304	4,037	2,697	6,670
CND PNEAPL(JAN)	MT										
CANADA		93	167	93	167	1,219	84	143	84	143	1,252
EU-15		15	95	15	95	574	15	102	15	102	509
KOREA, REPUBLIC		0	5	0	5	507	0	4	0	4	433
JAPAN		41	76	41	76	435	36	63	36	63	456
ITALY		0	0	0	0	307	0	0	0	0	256
GERMANY		15	0	15	0	188	15	0	15	0	188
OTHER		17	59	17	59	689	17	51	17	51	602
Subtotal:-----		166	402	166	402	3,424	151	363	151	363	3,252
FRT MIXTURES(JUN)	MT										
CANADA		359	666	3,260	4,788	5,531	434	710	4,141	5,628	6,954
PHILIPPINES		504	5	3,597	3,624	4,313	601	5	4,161	4,338	5,012
JAPAN		350	281	2,546	1,984	4,163	408	311	3,024	2,314	4,855
SINGAPORE		33	46	2,741	1,370	3,124	38	53	3,095	1,617	3,495
HONG KONG		52	60	1,997	1,526	2,793	61	73	2,237	1,784	3,192
OTHER		515	438	4,409	4,009	6,342	556	525	5,157	4,914	7,421
Subtotal:-----		1,815	1,496	18,549	17,301	26,266	2,097	1,676	21,815	20,594	30,930
DRIED FRUIT											
DRD RAISINS(AUG)	MT										
EU-15		3,045	3,218	31,087	31,476	56,132	5,628	5,321	50,308	51,976	91,112
UNITED KINGDOM		1,538	1,668	14,825	15,933	27,630	2,925	2,728	23,751	26,856	44,647
JAPAN		2,384	4,099	12,195	17,922	25,038	3,935	6,668	19,444	29,722	39,409
CANADA		704	820	6,106	6,135	10,447	1,367	1,713	12,412	12,388	21,000
GERMANY		364	577	5,105	3,926	9,210	584	998	7,612	6,025	14,128
OTHER		2,357	2,444	16,271	17,156	27,007	4,365	4,065	29,224	29,224	47,596
Subtotal:-----		8,491	10,630	65,659	72,689	118,624	15,295	17,766	111,388	123,310	199,116
DRD PRUNES(AUG)	MT										
EU-15		2,661	2,746	17,963	17,856	34,588	6,190	6,085	42,736	39,474	80,958
JAPAN		714	988	6,306	5,589	13,183	1,559	1,828	14,111	11,362	28,583
GERMANY		1,052	996	5,352	5,491	11,492	2,590	2,374	12,685	12,478	26,842
ITALY		447	629	3,905	3,280	6,593	1,127	1,371	9,454	7,950	16,373
UNITED KINGDOM		625	461	2,448	2,644	5,489	1,178	871	5,243	4,773	11,449
CANADA		299	303	2,045	2,094	4,167	699	726	4,929	4,752	9,782
OTHER		790	1,179	5,141	9,157	9,731	1,543	2,228	10,728	16,922	20,682
Subtotal:-----		4,464	5,216	31,455	34,697	61,669	9,991	10,866	72,504	72,510	140,006
FRUIT JUICES(SSE)											
ORANGE JU CNC (DEC)	KL										
EU-15		4,023	22,381	15,985	28,145	178,160	1,321	8,619	6,830	11,355	56,966
FRANCE		2,971	15,005	9,149	17,983	97,548	849	5,618	3,848	7,104	21,915
NETHERLANDS		453	6,095	5,272	6,678	56,271	215	2,168	2,191	2,475	22,597
JAPAN		2,983	3,897	4,219	5,637	51,640	1,512	2,385	2,672	3,485	27,038
CANADA		2,310	2,845	5,381	5,172	27,786	4,087	4,114	8,940	8,107	48,285
KOREA, REPUBLIC		307	568	990	3,028	20,340	263	515	876	1,983	13,907
OTHER		4,466	2,637	8,665	4,459	48,856	1,821	1,441	3,489	2,224	20,834
Subtotal:-----		14,089	32,328	35,241	46,442	326,782	9,005	17,074	22,807	27,154	167,031
ORNG JU NTCNC(DEC)	KL										
CANADA		8,423	11,474	18,026	21,668	104,395	6,136	7,715	12,968	14,415	73,021
EU-15		376	3,247	3,198	5,063	32,934	213	2,157	1,930	3,371	21,197
BELGIUM-LUXEMBOU		0	1,574	960	3,258	21,191	0	1,023	640	2,134	13,507
OTHER		2,680	1,566	4,317	3,969	23,227	2,022	1,191	3,290	3,218	19,518
Subtotal:-----		11,479	16,286	25,541	30,700	160,556	8,371	11,063	18,188	21,004	113,737
GRPFRT JU CNC (DEC)	KL										
EU-15		639	2,987	2,376	4,316	31,141	502	1,814	1,367	2,670	17,168
JAPAN		1,579	887	2,331	2,417	20,693	1,920	737	2,873	1,713	17,238
FRANCE		167	11	1,364	129	14,455	120	8	535	92	6,933
NETHERLANDS		319	1,149	650	1,647	9,802	266	832	667	1,236	6,772
ISRAEL		0	0	403	0	5,477	0	0	120	0	1,527
CANADA		243	230	437	431	3,829	401	316	709	630	5,710
OTHER		307	147	926	293	4,369	188	97	558	226	2,905
Subtotal:-----		2,769	4,251	6,472	7,457	65,508	3,012	2,965	5,627	5,239	44,549
FRESH VEGETABLES											
FR ASPARAGUS(OCT)	MT										
JAPAN		257	436	290	452	6,276	1,039	1,586	1,173	1,654	27,674
CANADA		135	349	443	756	4,567	397	972	1,353	2,178	12,488
SWITZERLAND		39	75	39	75	1,988	178	226	178	226	6,598
EU-15		13	39	103	64	1,304	53	94	201	152	4,194
OTHER		4	8	16	37	209	25	32	54	91	713
Subtotal:-----		447	907	891	1,384	14,344	1,691	2,911	2,960	4,302	51,666
FR ONIONS(OCT)	MT										
CANADA		8,602	9,714	29,258	33,761	103,048	3,313	3,290	11,046	11,847	36,260
JAPAN		13,084	7,323	52,859	26,982	79,476	3,193	1,705	11,970	6,376	19,360
OTHER		3,307	2,574	21,457	29,749	41,923	1,059	1,063	6,720	11,282	14,119
Subtotal:-----		24,993	19,611	103,573	90,491	224,447	7,565	6,057	29,737	29,505	69,739
CANNED VEGETABLES											
CND SWT CORN(AUG)	MT										
EU-15		2,623	2,411	22,421	18,000	46,309	2,065	1,564	17,270	12,032	35,341
JAPAN		3,433	4,619	18,197	29,261	45,654	2,683	3,852	14,236	24,688	36,581
TAIWAN		1,547	1,515	9,629	9,224	21,174	1,386	1,167	8,610	8,198	18,564
GERMANY		1,116	729	9,186	4,264	18,415	887	501	7,233	2,965	14,218
HONG KONG		435	711	7,107	10,147	17,451	346	606	5,828	8,472	14,333
UNITED KINGDOM		766	829	6,679	6,600	13,042	616	431	5,159	3,781	10,029
OTHER		2,038	3,569	16,048	20,767	35,753	1,629	3,353	13,054	19,183	29,581
Subtotal:-----		10,075	12,823	73,402	87,399	166,341	8,110	10,542	58,999	72,573	134,401

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
JAN 1997

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH VEGETABLES											
CND TOM PAS(JUL)	MT										
CANADA		3,734	2,526	30,019	32,985	45,326	2,867	1,792	24,818	24,224	37,231
JAPAN		495	764	6,017	6,206	12,354	410	552	5,078	4,820	10,120
EU 15		233	790	334	4,155	6,190	177	349	260	2,424	4,313
KOREA, REPUBLIC		521	753	3,345	3,418	5,908	443	668	3,038	2,822	5,421
ITALY		194	672	194	3,113	5,255	147	282	147	1,607	3,369
OTHER		907	9,873	12,782	28,877	17,863	803	6,678	9,098	19,659	13,681
Subtotal:-----		5,891	14,707	52,498	75,640	87,641	4,700	10,038	42,293	53,949	70,767
CND TOM SAUCE(JUL)	MT										
CANADA		4,947	4,565	30,156	34,336	54,007	4,648	4,155	28,321	31,048	49,485
JAPAN		586	575	3,450	3,150	6,116	551	959	3,395	4,046	6,143
EU 15		677	282	2,820	3,115	5,305	581	355	3,065	3,823	5,929
OTHER		1,167	1,215	8,297	8,354	14,992	1,397	1,234	8,910	7,934	15,589
Subtotal:-----		7,376	6,638	44,722	48,955	80,420	7,177	6,703	43,692	46,851	77,147
FRZN VEGETABLES											
FZN SWT CORN(JUL)	MT										
JAPAN		3,270	3,273	23,069	22,000	40,120	3,028	2,971	20,827	20,322	35,756
HONG KONG		258	181	2,030	3,001	3,872	202	110	1,549	2,054	2,878
CANADA		271	182	1,462	1,386	3,323	242	151	1,278	1,158	2,852
OTHER		678	1,220	7,627	6,534	11,658	565	1,084	5,822	5,353	9,012
Subtotal:-----		4,477	4,856	34,189	32,922	58,972	4,038	4,316	29,477	28,887	50,498
FZN F FRY(JUL)	MT										
JAPAN		13,975	18,940	100,065	111,165	183,767	10,439	14,789	73,438	82,527	135,152
KOREA, REPUBLIC		1,542	2,379	10,406	15,333	21,956	1,086	1,893	7,567	11,095	15,721
HONG KONG		1,226	2,398	11,891	15,916	21,136	827	1,606	7,883	10,594	13,999
OTHER		9,708	13,518	74,872	78,756	123,078	6,922	10,115	56,126	58,958	91,407
Subtotal:-----		26,450	37,235	197,234	221,171	349,937	19,273	28,403	145,014	163,173	256,280
TREE NUTS											
ALMONDS UNSH(JUL)	MT										
INDIA		444	516	4,475	7,759	6,323	1,065	1,243	10,763	19,197	15,128
JAPAN		148	80	3,752	770	4,669	358	195	10,262	1,940	12,500
EU 15		497	514	2,682	5,865	3,457	998	1,244	6,281	13,550	8,031
GERMANY		108	290	904	2,261	1,178	264	702	2,212	5,392	2,883
OTHER		212	256	1,810	3,638	2,331	532	624	4,341	8,780	5,655
Subtotal:-----		1,300	1,366	12,719	18,031	16,779	2,953	3,305	31,648	43,467	41,315
ALMND SH/PREP(JUL)	MT										
EU 15		13,428	7,410	101,113	90,181	170,076	40,393	37,862	332,964	427,606	559,077
GERMANY		5,328	2,303	37,767	33,652	62,871	15,409	11,262	130,114	152,892	211,429
JAPAN		2,806	1,675	20,859	12,931	40,454	5,963	9,976	54,276	70,830	93,264
NETHERLANDS		1,338	797	11,534	9,232	20,915	3,510	3,934	30,502	43,035	53,497
FRANCE		1,807	1,151	10,551	9,989	18,587	5,031	6,113	32,971	49,260	57,972
CANADA		1,242	479	10,460	5,454	16,726	3,256	2,621	26,276	25,812	41,184
OTHER		4,425	1,963	37,350	23,391	54,490	11,635	10,201	88,215	110,688	135,794
Subtotal:-----		21,900	11,527	169,779	131,959	281,745	61,247	60,660	501,730	634,937	829,318
WALNUTS SH(AUG)	MT										
JAPAN		327	1,002	4,401	4,940	7,676	1,712	3,211	16,213	21,819	31,804
EU 15		252	183	3,721	3,313	5,116	611	592	7,893	7,863	11,865
CANADA		166	310	1,291	1,915	2,110	621	781	4,573	5,868	7,678
SPAIN		34	0	1,260	1,208	1,794	184	0	2,613	2,759	3,998
ISRAEL		238	82	960	791	1,459	1,018	462	4,263	3,988	6,776
OTHER		206	233	2,063	2,759	3,931	807	1,170	6,329	8,488	12,495
Subtotal:-----		1,188	1,809	12,436	13,717	20,291	4,769	6,216	39,270	48,027	70,618
WALNUTS UNSH(AUG)	MT										
EU 15		304	307	47,201	47,127	48,199	548	685	90,652	101,790	92,596
GERMANY		101	56	14,555	11,829	14,603	167	129	27,804	25,934	27,908
SPAIN		0	0	13,364	14,261	13,877	0	0	24,856	28,943	25,912
ITALY		72	103	9,735	10,304	9,842	157	249	18,828	22,949	19,021
NETHERLANDS		39	58	4,013	6,493	4,135	75	132	8,032	14,573	8,223
OTHER		454	324	6,981	7,518	9,266	837	663	13,882	15,594	17,962
Subtotal:-----		758	631	54,183	54,646	57,464	1,385	1,348	104,534	117,384	110,558
HOPS&PRODUCTS											
HOP PELTS(SEP)	MT										
BRAZIL		136	172	1,328	1,072	2,168	718	712	6,797	3,945	11,226
CANADA		111	162	461	596	1,397	711	1,218	2,983	4,098	9,232
EU 15		77	133	371	516	628	396	703	1,992	3,248	3,253
JAPAN		103	98	123	154	326	484	352	549	561	1,264
OTHER		62	251	469	396	1,006	233	805	1,771	2,040	4,951
Subtotal:-----		488	816	2,752	2,735	5,524	2,541	3,790	14,092	13,892	29,926
HOP EXTRACT(SEP)	MT										
EU 15		198	158	741	714	1,438	2,998	2,481	10,946	10,919	21,474
MEXICO		88	7	287	296	489	2,623	88	7,922	6,868	13,202
GERMANY		116	101	302	233	467	1,658	1,357	4,168	3,293	6,539
COLOMBIA		0	0	320	59	345	0	0	2,462	1,781	3,144
BRAZIL		58	40	144	263	313	625	473	1,665	2,824	3,624
UNITED KINGDOM		39	10	202	64	300	412	221	2,451	1,032	3,884
OTHER		18	91	270	371	945	241	1,649	4,287	5,419	15,361
Subtotal:-----		360	296	1,760	1,703	3,530	6,488	4,691	27,282	27,811	56,806
HOPS,NSPF(SEP)	MT										
EU 15		89	0	1,563	773	2,279	446	0	7,488	3,679	11,478
GERMANY		18	0	1,169	435	1,604	94	0	5,213	1,787	7,204
UNITED KINGDOM		70	0	348	295	605	352	0	1,950	1,712	3,875
MEXICO		0	0	74	0	342	0	0	265	0	2,129
OTHER		13	171	154	315	515	94	801	2,029	2,156	4,485
Subtotal:-----		101	171	1,790	1,089	3,135	540	801	9,782	5,835	18,092
WINE											
GRAPE WINE(JAN)	KL										
EU 15		3,486	5,085	3,486	5,085	72,708	6,464	11,577	6,464	11,577	144,223
UNITED KINGDOM		1,658	2,342	1,658	2,342	37,541	3,798	4,980	3,798	4,980	79,523
CANADA		1,716	2,576	1,716	2,576	32,960	3,166	4,885	3,166	4,885	67,001
JAPAN		938	1,345	938	1,345	16,753	1,548	2,454	1,548	2,454	28,374
GERMANY		424	816	424	816	8,692	556	2,629	556	2,629	18,073
SWITZERLAND		636	546	636	546	8,376	1,111	1,078	1,111	1,078	13,759
OTHER		1,607	2,727	1,607	2,727	29,489	2,619	3,985	2,619	3,985	47,567
Subtotal:-----		8,383	12,279	8,383	12,279	160,284	14,908	23,980	14,908	23,980	300,923

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
JAN 1997

COMMODITY AND COUNTRY COUNTRY REGION		QUANTITY CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR FRT & MLNS											
FR APPLES(JUL)	MT										
NEW ZEALAND		0	0	11,332	18,540	49,027	0	0	15,086	17,258	52,798
CANADA		5,901	4,812	50,067	55,766	71,873	2,944	2,532	18,291	19,713	27,528
OTHER		2	0	9,621	9,186	47,829	6	0	5,539	3,021	22,624
Subtotal:-----		5,903	4,812	71,020	83,492	168,729	2,950	2,532	38,916	39,992	102,950
FR PEARS(JUL)	MT										
CHILE		485	1,162	504	1,252	33,339	208	629	214	657	15,642
ARGENTINA		0	0	0	0	15,637	0	0	0	0	10,261
OTHER		29	69	1,658	1,624	8,366	59	40	4,113	4,150	8,109
Subtotal:-----		514	1,231	2,162	2,876	57,341	267	669	4,327	4,807	34,013
APRICOT (MAY)	MT										
CHILE		380	40	1,325	969	1,344	308	41	1,584	1,089	1,604
NEW ZEALAND		69	113	69	113	310	166	246	166	246	852
OTHER		0	0	6	105	16	0	0	9	263	22
Subtotal:-----		449	154	1,400	1,187	1,670	474	287	1,759	1,598	2,477
PEACH-NEC(MAY)	MT										
CHILE		13,986	15,236	18,223	22,460	40,677	10,928	11,246	15,464	18,841	30,485
OTHER		6	39	257	499	392	6	23	250	440	416
Subtotal:-----		13,992	15,275	18,480	22,959	41,069	10,934	11,269	15,715	19,281	30,901
PLUM-PRUNE(MAY)	MT										
CHILE		4,848	4,113	6,146	6,251	19,665	4,284	3,688	5,814	6,253	16,487
OTHER		9	3	202	193	214	12	7	293	246	310
Subtotal:-----		4,857	4,116	6,348	6,443	19,879	4,297	3,695	6,107	6,499	16,797
FRESH GRAPES (MAY)	MT										
CHILE		51,037	67,344	65,759	101,276	273,685	62,291	68,943	87,334	136,997	250,990
MEXICO		0	0	80,492	59,956	80,569	0	0	82,696	86,724	82,797
OTHER		150	159	2,164	3,821	5,250	128	279	1,503	2,027	4,141
Subtotal:-----		51,187	67,503	148,415	165,053	359,503	62,419	69,221	171,533	225,748	337,929
FR RASPBRY(JAN)	MT										
CANADA		0	0	0	0	4,624	0	0	0	0	9,071
CHILE		100	220	100	220	1,141	204	518	204	518	2,235
OTHER		65	65	65	65	641	594	516	594	516	3,199
Subtotal:-----		166	286	166	286	6,406	798	1,035	798	1,035	14,505
FR STRAWBRIS(JAN)	MT										
MEXICO		2,468	2,003	2,468	2,003	29,434	7,212	3,728	7,212	3,728	52,726
OTHER		16	12	16	12	1,096	59	40	59	40	2,705
Subtotal:-----		2,484	2,015	2,484	2,015	30,530	7,272	3,768	7,272	3,768	55,431
FR BANANA(JAN)	MT										
COSTA RICA		79,445	78,663	79,445	78,663	970,001	25,383	24,833	25,383	24,833	309,551
ECUADOR		80,466	84,568	80,466	84,568	848,772	22,276	25,926	22,276	25,926	237,818
HONDURAS		64,141	42,942	64,141	42,942	639,597	16,971	11,223	16,971	11,223	166,864
OTHER		103,831	87,535	103,831	87,535	1,318,623	29,066	26,222	29,066	26,222	384,207
Subtotal:-----		327,884	293,709	327,884	293,709	3,776,992	93,696	88,205	93,696	88,205	1,098,440
FR MANGO(JAN)	MT										
MEXICO		0	0	0	0	139,261	0	0	0	0	80,606
OTHER		2,797	2,743	2,797	2,743	32,743	2,763	2,333	2,763	2,333	25,781
Subtotal:-----		2,797	2,743	2,797	2,743	172,004	2,763	2,333	2,763	2,333	106,387
FR PINAPLE(JAN)	MT										
COSTA RICA		5,562	9,049	5,562	9,049	84,142	1,922	4,359	1,922	4,359	34,374
HONDURAS		2,480	1,752	2,480	1,752	27,084	686	486	686	486	7,561
OTHER		993	1,265	993	1,265	20,842	254	394	254	394	6,701
Subtotal:-----		9,035	12,066	9,035	12,066	132,068	2,862	5,240	2,862	5,240	48,636
FR CANTLPE(MAY)	MT										
MEXICO		8,075	9,202	57,874	75,082	130,065	1,985	4,673	18,283	27,899	39,141
COSTA RICA		7,557	4,533	12,848	7,743	61,327	3,428	2,194	5,561	3,411	28,640
GUATEMALA		12,855	10,485	33,742	27,761	55,075	2,719	3,904	8,863	9,737	15,890
OTHER		13,935	21,639	29,858	39,623	77,095	3,553	5,027	7,370	9,154	20,169
Subtotal:-----		42,421	45,858	134,321	150,209	323,563	11,685	15,798	40,076	50,202	103,840
FR MELON,OT(MAY)	MT										
MEXICO		4,917	6,261	37,284	30,556	55,740	1,339	2,242	12,345	10,573	19,311
COSTA RICA		476	587	1,446	1,177	17,027	186	228	577	439	7,408
OTHER		9,885	9,429	22,381	22,829	48,588	3,860	3,189	8,210	7,581	17,302
Subtotal:-----		15,278	16,277	61,111	54,563	121,354	5,384	5,659	21,132	18,592	44,022
FR ORANGES(NOV)	MT										
AUSTRALIA		0	0	0	0	11,550	0	0	0	0	17,652
OTHER		1,299	2,114	1,929	2,905	11,625	614	1,075	945	1,489	4,756
Subtotal:-----		1,299	2,114	1,929	2,905	23,175	614	1,075	945	1,489	22,408
CANNED FRUIT											
CND MANDRN(JAN)	MT										
CHINA, PEOPLES R		693	284	693	284	11,628	735	272	735	272	11,912
EU-15		176	284	176	284	8,045	210	189	210	189	7,972
SPAIN		176	284	176	284	8,041	210	189	210	189	7,958
OTHER		99	10	99	10	319	108	8	108	8	334
Subtotal:-----		968	579	968	579	19,992	1,053	469	1,053	469	20,218
CND BLK OLV(NOV)	MT										
EU-15		1,408	911	3,916	3,364	13,352	3,157	2,044	8,761	7,690	31,610
SPAIN		1,293	798	3,527	2,894	11,459	2,887	1,756	7,879	6,336	26,739
MOROCCO		607	1,007	1,460	1,830	6,347	1,301	2,063	3,234	3,748	14,563
OTHER		20	24	47	51	162	40	45	105	117	372
Subtotal:-----		2,035	1,942	5,424	5,245	19,861	4,498	4,152	12,099	11,555	46,545
CND GRN OLV(NOV)	MT										
EU-15		2,378	2,200	8,248	8,889	32,529	6,775	5,997	25,110	23,865	94,375
SPAIN		2,358	2,179	8,163	8,808	32,305	6,731	5,920	24,913	23,632	93,667
OTHER		54	109	301	389	1,489	116	151	602	629	2,753
Subtotal:-----		2,432	2,308	8,550	9,278	34,018	6,890	6,149	25,712	24,494	97,128
CND PEACH(JUN)	MT										
EU-15		1,216	2,725	7,785	17,944	10,568	986	1,790	5,223	11,782	7,087
GREECE		1,208	2,097	7,714	14,865	10,489	976	1,356	5,058	9,564	6,898
OTHER		256	346	2,901	3,005	3,532	191	231	2,051	2,089	2,539
Subtotal:-----		1,471	3,071	10,687	20,949	14,100	1,177	2,021	7,274	13,871	9,626
CND PINAPLE(JAN)	MT										
PHILIPPINES		9,190	12,150	9,190	12,150	125,452	5,859	7,900	5,859	7,900	81,542
THAILAND		5,855	7,528	5,855	7,528	78,032	4,291	4,786	4,291	4,786	54,759
INDONESIA		3,287	3,515	3,287	3,515	54,822	2,215	2,783	2,215	2,783	41,017
OTHER		2,564	3,141	2,564	3,141	39,043	1,954	2,246	1,954	2,246	20,978
Subtotal:-----		20,896	26,335	20,896	26,335	297,349	14,319	17,715	14,319	17,715	198,297
DRIED FRUIT											
DRD APRCT(JUL)	MT										
TURKEY		1,607	1,068	8,989	6,967	14,091	3,441	3,060	18,073	18,576	28,562
OTHER		88	168	381	471	533	248	377	1,202	1,279	1,576
Subtotal:-----		1,695	1,235	9,371	7,439	14,625	3,690	3,438	19,274	19,855	30,138

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
JAN 1997

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY					VALUE (1,000 DOLLARS)				
		CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
DATES(SEP)	MT										
PAKISTAN		551	196	1,276	765	3,172	572	181	1,280	701	3,170
CHINA, PEOPLES R		115	92	194	228	620	219	183	356	391	1,103
ISRAEL		85	0	471	41	522	221	0	971	138	1,088
OTHER		17	9	251	195	338	25	19	442	414	607
Subtotal:-----		768	297	2,191	1,228	4,652	1,036	383	3,049	1,644	5,968
DRD FIG(SEP)	MT										
EU-15		0	0	823	1,009	823	0	0	1,919	2,323	1,919
GREECE		0	0	802	973	802	0	0	1,849	2,182	1,849
TURKEY		94	12	572	366	678	158	29	1,122	838	1,239
MEXICO		38	20	282	326	307	101	49	869	831	916
OTHER		0	5	6	13	45	2	11	17	38	73
Subtotal:-----		132	37	1,683	1,715	1,853	261	89	3,927	4,030	4,147
DRD RAISIN(AUG)	MT										
MEXICO		536	267	5,827	4,985	8,370	513	183	4,917	4,507	7,796
CHILE		111	0	932	1,157	1,724	104	0	1,049	1,384	2,006
OTHER		254	281	1,030	641	2,013	247	364	1,047	776	2,045
Subtotal:-----		902	548	7,790	6,783	12,107	864	547	7,013	6,667	11,847
FRUIT JUICE(SSE)											
APPLE JUIC(JUL)	KL										
ARGENTINA		0	425	131,610	118,417	314,057	0	104	47,686	38,748	110,229
EU-15		28,815	32,296	128,970	188,082	219,220	12,835	10,676	55,131	67,466	92,527
GERMANY		22,344	22,344	82,836	135,084	159,519	9,424	6,872	35,613	47,524	65,955
OTHER		17,646	64,366	162,189	305,274	305,039	8,094	21,422	61,585	108,755	114,986
Subtotal:-----		46,462	97,087	422,769	611,773	838,316	20,930	32,202	164,402	214,969	317,741
FCOJ(DEC)	KL										
BRAZIL		61,364	83,017	106,096	186,532	703,184	14,935	17,230	25,858	37,887	173,085
MEXICO		11,862	4,281	18,006	22,483	162,610	3,016	979	4,555	5,262	47,432
OTHER		8,821	7,422	13,179	19,494	101,815	1,899	1,713	2,728	4,589	30,355
Subtotal:-----		82,047	94,720	137,281	228,508	967,609	19,850	19,922	33,141	47,738	250,872
GRAPE JU(JAN)	KL										
ARGENTINA		14,003	3,641	14,003	3,641	168,435	3,236	1,479	3,236	1,479	46,329
OTHER		4,065	4,509	4,065	4,509	56,029	1,313	2,425	1,313	2,425	22,217
Subtotal:-----		18,067	8,150	18,067	8,150	224,464	4,548	3,903	4,548	3,903	68,545
PNEAPL JUCN(JAN)	KL										
THAILAND		10,663	11,164	10,663	11,164	103,944	3,224	3,400	3,224	3,400	34,356
PHILIPPINES		8,655	12,003	8,655	12,003	100,644	1,334	2,518	1,334	2,518	17,260
OTHER		3,177	2,216	3,177	2,216	50,206	1,063	735	1,063	735	16,183
Subtotal:-----		22,495	25,384	22,495	25,384	254,794	5,621	6,653	5,621	6,653	67,799
PNEAPL JUNC(JAN)	KL										
PHILIPPINES		1,333	5,475	1,333	5,475	38,678	409	1,676	409	1,676	11,952
THAILAND		3,179	769	3,179	769	13,895	945	560	945	560	7,607
OTHER		76	466	76	466	10,013	48	67	48	67	2,129
Subtotal:-----		4,589	6,710	4,589	6,710	62,586	1,402	2,303	1,402	2,303	21,688
FROZEN FRUIT											
FZN STRBRY(DEC)	MT										
MEXICO		1,038	2,050	1,428	2,567	20,599	880	1,758	1,146	2,237	16,703
OTHER		95	10	153	53	283	95	100	191	180	825
Subtotal:-----		1,133	2,060	1,581	2,620	20,882	975	1,858	1,337	2,417	17,527
FRESH VEGETABLES											
FR BEANS(OCT)	MT										
MEXICO		3,794	4,963	8,921	8,604	18,611	3,996	4,815	8,289	8,956	20,030
OTHER		29	35	58	283	692	22	40	53	232	623
Subtotal:-----		3,823	4,998	8,979	8,887	19,302	4,018	4,855	8,341	9,188	20,653
FR CARROT(OCT)	MT										
CANADA		8,716	7,132	41,621	37,797	67,654	2,403	1,646	11,106	8,880	18,424
MEXICO		2,208	2,029	7,607	8,606	33,599	360	350	1,155	1,455	5,624
OTHER		103	117	232	197	690	36	51	102	76	250
Subtotal:-----		11,027	9,278	49,460	46,600	101,943	2,800	2,048	12,363	10,412	24,298
FR CABBAGE(OCT)	MT										
CANADA		2,930	1,836	12,851	7,800	28,206	698	382	3,220	1,603	7,631
MEXICO		1,213	828	4,814	2,784	13,301	246	166	891	478	2,358
OTHER		20	31	20	33	22	9	25	10	33	18
Subtotal:-----		4,163	2,695	17,686	10,616	41,529	952	572	4,121	2,114	10,007
FR CELERY(OCT)	MT										
MEXICO		3,100	3,306	6,087	4,858	23,076	662	901	1,378	1,251	4,797
OTHER		34	21	446	882	3,416	38	21	172	313	1,139
Subtotal:-----		3,134	3,327	6,533	5,740	26,492	701	922	1,549	1,565	5,936
FR CUCMBR(OCT	MT										
MEXICO		47,355	48,361	124,121	141,363	277,516	13,559	12,120	30,317	40,953	106,236
OTHER		3,464	2,182	6,048	3,925	18,391	839	845	2,095	2,253	9,372
Subtotal:-----		50,819	50,543	130,168	145,288	295,907	14,398	12,965	32,412	43,205	115,608
FR CAULFLWR(OCT)	MT										
CANADA		0	0	387	216	5,990	0	0	117	95	2,378
OTHER		181	103	403	484	1,012	91	25	157	171	405
Subtotal:-----		181	103	790	701	7,003	91	25	274	266	2,783
FR GARLIC(OCT)	MT										
MEXICO		0	5	92	201	16,715	0	11	85	380	19,521
OTHER		968	827	2,518	1,774	5,723	1,252	1,169	2,972	2,494	7,691
Subtotal:-----		968	832	2,610	1,976	22,438	1,252	1,181	3,057	2,874	27,212
FR ONION(OCT)	MT										
MEXICO		16,075	17,437	40,010	45,866	219,900	14,341	11,610	44,282	40,952	126,837
OTHER		10,771	10,731	18,481	28,840	45,365	5,456	3,948	8,697	10,186	18,842
Subtotal:-----		26,846	28,168	58,492	74,706	265,265	19,797	15,558	52,978	51,138	145,679
FR PEPPERS(OCT)	MT										
MEXICO		37,894	40,371	84,545	92,662	243,766	22,032	36,869	51,154	82,308	140,762
EU-15		42	67	3,597	5,486	16,915	212	199	10,723	12,001	42,732
NETHERLANDS		39	55	3,490	5,384	16,601	198	186	10,365	11,783	41,735
OTHER		446	888	2,500	3,192	8,876	817	1,904	4,579	5,602	15,908
Subtotal:-----		38,382	41,326	90,642	101,340	269,558	23,061	38,972	66,455	99,911	199,403
FR SEED POT(OCT)	MT										
CANADA		13,014	10,455	26,436	21,395	136,546	1,994	1,839	4,002	4,204	26,550
OTHER		0	0	27	0	89	2	0	19	0	58
Subtotal:-----		13,014	10,455	26,463	21,395	136,635	1,996	1,839	4,020	4,204	26,607
FR TBL POT(OCT)	MT										
CANADA		37,625	20,758	142,387	85,574	353,273	7,807	3,657	28,916	15,832	71,973
OTHER		0	0	0	0	0	0	0	0	0	0
Subtotal:-----		37,625	20,758	142,387	85,574	353,273	7,807	3,657	28,916	15,832	71,973

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
JAN 1997

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
FR TOMATO(OCT)	MT										
MEXICO		85,494	91,213	198,495	212,440	677,452	57,161	55,697	143,965	126,975	595,875
OTHER		1,672	2,915	7,420	12,966	47,170	3,525	6,721	14,719	25,933	84,102
Subtotal:-----		87,166	94,128	205,915	225,406	724,621	60,686	62,418	158,684	152,908	679,977
FR ASPARG(OCT)	MT										
MEXICO		1,455	3,804	2,656	5,129	18,317	3,805	7,429	6,450	10,943	32,841
PERU		714	876	6,163	6,820	10,048	1,240	1,459	11,372	11,443	18,802
OTHER		160	162	3,393	3,977	4,969	324	345	4,073	4,908	6,513
Subtotal:-----		2,329	4,842	12,212	15,926	33,333	5,369	9,233	21,896	27,294	58,156
CANNED VEGETABLES											
CND TOM PST(JUL)	MT										
MEXICO		0	0	3	0	7,987	0	0	2	0	5,149
ISRAEL		399	200	2,436	3,060	3,549	294	171	1,978	2,636	2,929
CHILE		56	49	2,057	322	2,349	46	44	1,536	239	1,810
OTHER		56	415	903	1,147	1,351	65	375	914	1,155	1,373
Subtotal:-----		512	664	5,399	4,529	15,236	404	589	4,429	4,030	11,261
CND TOM SAUCE(JUL)	MT										
EU-15		756	552	4,028	3,788	6,605	1,639	1,246	5,535	6,233	9,995
CANADA		929	438	6,527	2,588	10,790	626	492	4,506	2,530	7,386
SPAIN		400	313	1,059	1,403	2,038	1,382	1,121	3,644	4,904	7,081
OTHER		270	174	4,393	2,139	6,222	425	312	4,321	2,741	5,395
Subtotal:-----		1,954	1,164	14,947	8,515	23,616	2,691	2,049	14,362	11,504	22,776
CND TOMATO(JUL)	MT										
ISRAEL		3,050	435	17,760	3,330	19,674	1,775	244	10,911	1,825	11,947
EU-15		2,331	4,397	11,743	23,241	20,409	682	1,749	3,251	8,885	5,747
CHILE		1,081	185	8,317	3,362	11,725	519	69	3,854	1,627	5,569
ITALY		2,117	4,181	11,345	21,650	19,475	638	1,652	3,139	8,291	5,508
OTHER		867	288	3,138	3,724	6,871	412	139	1,490	1,845	3,479
Subtotal:-----		7,328	5,305	40,958	33,657	58,679	3,388	2,202	19,506	14,182	26,743
CND MSHROOM(JUL)	MT										
CHINA, PEOPLES R		1,293	3,761	12,949	22,615	23,912	2,405	5,272	27,616	34,344	46,720
INDONESIA		1,036	1,434	8,676	8,705	14,579	2,585	3,036	22,101	19,057	35,124
OTHER		1,515	1,554	12,003	9,890	18,725	3,520	2,903	28,441	20,480	43,290
Subtotal:-----		3,844	6,749	33,628	41,209	57,215	8,510	11,211	78,158	73,882	125,134
FROZEN VEGETABLES											
FZN BROCLI(SEP)	MT										
MEXICO		18,661	11,236	69,716	60,524	160,546	9,916	6,937	37,875	37,297	86,277
GUATEMALA		1,692	1,157	11,623	11,091	22,464	1,306	946	9,032	8,136	16,479
OTHER		4	41	27	67	67	6	49	16	78	48
Subtotal:-----		20,357	12,435	81,365	71,682	183,077	11,228	7,932	46,922	45,511	102,804
FZN CAULFLR(SEP)	MT										
MEXICO		2,761	2,782	12,094	12,668	16,387	1,473	2,060	7,109	9,497	10,062
OTHER		161	112	929	835	1,847	134	99	669	664	1,331
Subtotal:-----		2,922	2,894	13,022	13,502	18,234	1,607	2,159	7,778	10,161	11,393
FZN POTATO(SEP)	MT										
CANADA		15,287	24,614	69,755	105,732	178,331	9,104	14,683	41,839	63,955	109,287
OTHER		8	64	61	196	283	25	44	112	208	407
Subtotal:-----		15,295	24,678	69,816	105,928	178,614	9,129	14,727	41,951	64,162	109,693
TREE NUTS											
PISTACHIO NSH(SEP)	MT										
TURKEY		60	1	225	158	230	156	4	585	594	609
OTHER		0	0	8	0	54	0	0	12	2	162
Subtotal:-----		60	1	233	159	284	156	4	597	595	771
CASHEW NUT(AUG)	MT										
INDIA		2,075	2,070	14,360	15,689	27,355	9,875	10,324	68,594	80,559	134,902
BRAZIL		2,890	2,927	11,665	13,359	25,018	13,968	12,763	57,171	61,441	121,183
OTHER		319	631	2,242	3,886	5,085	1,400	2,471	10,184	16,345	22,976
Subtotal:-----		5,284	5,628	28,268	32,934	57,458	25,243	25,558	135,949	158,345	279,061
FILBERTS(AUG)	MT										
TURKEY		298	349	2,292	2,068	4,395	1,057	1,316	8,366	7,436	14,816
OTHER		5	6	554	196	658	28	32	736	426	1,142
Subtotal:-----		303	356	2,845	2,264	5,053	1,086	1,348	9,102	7,862	15,958
PECANS NSH(SEP)	MT										
MEXICO		3,796	3,903	18,985	14,520	20,122	4,535	4,175	26,459	14,954	27,608
OTHER		0	0	0	0	0	0	0	0	0	0
Subtotal:-----		3,796	3,903	18,985	14,520	20,122	4,535	4,175	26,459	14,954	27,608
WINES											
CHMP&SPRK WN(JAN)	KL										
EU-15		1,322	1,018	1,322	1,018	30,385	13,283	10,249	13,283	10,249	318,821
FRANCE		402	379	402	379	11,031	9,023	7,033	9,023	7,033	224,963
ITALY		623	404	623	404	10,753	3,029	2,166	3,029	2,166	55,160
OTHER		3	14	3	14	247	28	67	28	67	863
Subtotal:-----		1,326	1,032	1,326	1,032	30,632	13,311	10,316	13,311	10,316	319,684
FT&VERM WN(JAN)	KL										
EU-15		1,287	1,114	1,287	1,114	15,474	5,137	5,685	5,137	5,685	76,142
PORTUGAL		107	192	107	192	2,716	957	2,250	957	2,250	32,142
ITALY		726	487	726	487	8,336	1,887	1,368	1,887	1,368	22,128
SPAIN		334	285	334	285	3,043	1,701	1,403	1,701	1,403	14,405
OTHER		34	38	34	38	366	120	181	120	181	1,807
Subtotal:-----		1,321	1,151	1,321	1,151	15,840	5,258	5,867	5,258	5,867	77,949
OTH GP WINE(JAN)	KL										
EU-15		14,618	14,644	14,618	14,644	214,002	47,693	52,750	47,693	52,750	806,099
FRANCE		3,777	5,629	3,777	5,629	80,993	19,772	25,539	19,772	25,539	388,699
ITALY		9,310	7,144	9,310	7,144	108,258	22,765	20,899	22,765	20,899	328,256
OTHER		5,388	7,992	5,388	7,992	89,550	12,936	21,352	12,936	21,352	214,316
Subtotal:-----		20,006	22,637	20,006	22,637	303,552	60,629	74,102	60,629	74,102	1,020,415
OTH WN PROD(JAN)	KL										
JAPAN		152	121	152	121	1,708	741	468	741	468	7,753
EU-15		334	127	334	127	5,319	488	232	488	232	6,386
UNITED KINGDOM		83	55	83	55	2,744	98	48	98	48	2,677
OTHER		140	219	140	219	2,251	167	351	167	351	2,905
Subtotal:-----		626	467	626	467	9,277	1,396	1,051	1,396	1,051	17,045
CUT FLOWERS											
ROSES(JAN)	NONE										
COLOMBIA		0	0	0	0	0	11,435	9,870	11,435	9,870	119,624
ECUADOR		0	0	0	0	0	2,206	3,379	2,206	3,379	36,518
OTHER		0	0	0	0	0	1,842	1,292	1,842	1,292	22,781
Subtotal:-----		0	0	0	0	0	15,484	14,541	15,484	14,541	178,923
CARNATIONS(JAN)	NONE										
COLOMBIA		0	0	0	0	0	13,562	11,698	13,562	11,698	121,204
OTHER		0	0	0	0	0	433	683	433	683	5,441
Subtotal:-----		0	0	0	0	0	13,996	12,382	13,996	12,382	126,646

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